



JRC SCIENCE FOR POLICY REPORT

# Multidimensional coaching for socio-economic advancement of people in poverty

Insights from innovative practices across the world



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## Abstract

The purpose of the report is to highlight a relatively new approach to social assistance for people in poverty, focusing on multidimensional coaching. The approach represents a paradigm shift in social assistance design, as it moves away from a top-down relationship between social worker and client towards a more collaborative relationship aimed at empowering the person in poverty. Coaching consists of a systematic, structured and intensive collaboration between the person in poverty and a mentor. It focuses on the many life dimensions that are affected by poverty, starting with an assessment of needs carried out by the person in poverty with the support of a mentor, rather than the other way round.

The report is the result of a series of exchanges among the initiators and leaders of practices of this kind that are implemented across the world. While they differ in scope and specific methodologies, the practices share several common elements and the common purpose of accompanying clients in the development of crucial capabilities for socioeconomic advancement.

The approach does not replace other necessary forms of support addressing material deprivation, but it may complement it effectively, potentially transforming the way assistance to people in poverty is provided. Impact evaluations carried out on several of the initiatives illustrated in the report show that the approach may constitute effective support to help people overcome poverty.

## Acknowledgements

This work, from its conception to its finalisation, is the result of a close cooperation that started in 2022 between Dominique Bé (then in DG Employment, Social Affairs and Inclusion), Laura Cassio (Joint Research Centre) and Georgia Efremova (then in DG Economic and Financial Affairs; currently in Gergina Human Development Foundation). It was triggered by the exchanges around the 2021 JRC report *Poverty and Mindsets*, looking at how poverty and exclusion affect aspirations and agency and briefly reviewing some promising practices to address the issue. Among them, multidimensional coaching appeared particularly groundbreaking. It seemed useful to further disseminate such practices for use by policymakers and practitioners, by providing a practical description of some crucial elements that may be transferred to other contexts.

The content of the present report brings together contributions from leaders of such practices (who should thus be considered as the actual authors): Elisabeth Babcock, Victoria Bazurto, Martin Burt, Palash Kanti Das, Rosita Esgard, Angélique Greget, Martin Gricourt, Katharina Hammler, Rozina Haque, Elena Kabakchieva, Bert Luyts, Upoma Mahbub, Marta Marczis, Lilya Makaveeva, Paola Milani, Rasha Natour, Ana Oprisan, Luis Fernando Sanabria, Sylvia Vassileva and Magdalena Ziolek-Skrzypczak.

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## Executive summary

Poverty is arguably the most significant obstacle to human development. Its persistence at the global level and throughout time shows that addressing it is a complex and difficult feat.

Understanding and tackling poverty requires a full examination of both its drivers and its effects, and of the complex interactions between them. This includes how systemic inequalities in distribution and transmission of resources and opportunities cause and maintain poverty; how mechanisms of power relations, culture and group dynamics affect individuals and communities; and also how the experience of poverty impacts capabilities – how it disempowers and reduces aspirations and self-efficacy. These elements interact and compound one another, contributing to the perpetuation of the problem.

Thus, the effectiveness of poverty reduction interventions may depend on how they take into consideration and address not only material deprivation and the systemic issues of discrimination and exclusion, but also the inner experience of disempowerment that may characterise the experience of poverty, especially when prolonged across generations.

Such a focus on disempowerment is not yet a feature of most mainstream measures. The purpose of this report is to outline some ways of integrating this dimension into interventions, highlighting how this may enhance the likelihood of interventions helping people move out of poverty. In particular, this report looks at practices of multidimensional coaching that support people experiencing persistent poverty and exclusion in building the capability to flourish.

Such practices suggest that addressing people's inner, core experiences of long-term poverty and exclusion may accompany and enhance crucial measures tackling material deprivation, such as income support, social infrastructure and access to the labour market, effectively. It is important to note that the models presented in the report do not replace other forms of support addressing material deprivation, but they can transform the way assistance to people in poverty is provided and made effective by complementing them with support with regard to agency, decision-making and personal and group empowerment.

The content of this report stems from a series of exchanges with the leaders of a number of multidimensional coaching practices across the world. They are the innovators and early adopters of this approach. The specific methodologies of each practice are described in Annexes 1 and 2.

The exchanges with experts allowed us to carry out a comparative analysis of the practices and distil the essential common elements and success factors. They are outlined in Chapters 1–3 of the report.

In a nutshell, multidimensional coaching represents a paradigm shift in the design and implementation of social inclusion measures towards a more collaborative, person-centric empowerment approach.

The coaching practices consist of a systematic, structured and intensive collaboration between the person in poverty and a mentor. They support people in addressing and overcoming their situation of deprivation, while helping them expand their awareness and self-efficacy. Thus, the coaching practices tackle the sentiment of disempowerment and help build up agency, providing a long-lasting pathway out of poverty.

Such coaching practices are multidimensional, addressing a wide range of different needs – because the issues affecting people in poverty are manifold, interdependent and often inextricable.

Crucially, the approach transforms the framing of people experiencing poverty: people are seen not as passive, needy recipients, but as active, resourceful decision- and change-makers. The assessment of needs, the identification of resources to address them and the setting of goals are carried out by the person in poverty, with the support of the mentor, rather than imposed in a top-down manner. Research demonstrates that the process of goal setting for oneself is a crucial element of change and central to any pathway of development.

Coaching differs from traditional social assistance delivery in that it requires a move away from compliance and control towards a partnership between people in poverty and social services.

The mentor assists clients in breaking down identified goals into manageable steps, and then encourages and accompanies them in monitoring progress over time. This process is often based on structured tools developed by the programme. The relationship between mentor and client is founded on mutual respect and trust, and the mentor seeks collaboration using the full range of available services and resources to help clients achieve their goals. This requires substantial skills, including the ability to provide non-judgemental support and specific training on how to activate resources on behalf of the client. The mentor must also hold

an inner conviction that success is possible. In turn, this underscores the importance of the implementing organisation showcasing evidence of success and supporting expectations.

Another critical element of success is working with a long-term perspective, particularly when supporting people experiencing long-term poverty. Rebuilding agency, aspirations, resilience and hope should be seen as a long-term endeavour.

Monitoring progress through careful data collection is particularly important in this long-term perspective. The experts also underline the importance of the approach being governed by the principle of ‘trust-based accountability’, with this applying to both the relationship between the mentor and the client and the relationship between the implementing organisation and its funders. While the actor of change sets goals and decides how to achieve them, monitoring progress collaboratively is crucial to identifying possible weaknesses in the process and correcting them. Shifting to a coaching model may thus imply shifting to a joint learning mode, allowing individuals and organisations alike to evolve.

The practices presented in this report represent a diversity of experience and insights. Some of them are highly codified and already widely applied, while others represent local experimentations. However, all are very relevant to their specific context and aims. While these practices primarily aim to support individuals or families, some also extend to and work with communities, recognising the importance of developing collective agency for social and cultural change. They all share a holistic approach, with the common goal of empowering clients to develop capabilities and autonomy for achieving life mobility, socioeconomic advancement and well-being through long-term accompaniment.

The preparation of this report originated from the belief that a closer look at multidimensional coaching methodologies could open new avenues for the implementation of social development and poverty reduction actions, including under EU social investment policy and programming. The findings underscore the importance of tackling the impact of persistent poverty on aspirations, hopes and decision-making, along with the material aspects of deprivation – and, more specifically, the findings suggest that coaching might be a possible game changer for poverty reduction measures.



## Introduction

### Policy context

The EU has among its main aims the promotion of the well-being of its people, and it has a clear mandate <sup>(1)</sup> to combat exclusion and promote social justice and protection.

This mandate is encapsulated in the European Pillar of Social Rights, aimed at providing equal opportunities for all, fair working conditions and social protection.

Sustainability and fairness are at the heart of current political visions and policy developments for the European economy and society <sup>(2)</sup>. Building on a substantial track record of inclusion and poverty reduction policy, the 2020 European Commission communication on a strong social Europe for just transitions<sup>3</sup> identified key social challenges, and also subsequent targeted initiatives and frameworks, and further defined EU goals and specific targets for the policy initiatives relating to social inclusion, poverty reduction and cohesion.

In relation to poverty, the EU target is to lift at least 15 million people, including at least 5 million children, out of poverty and social exclusion by 2030 <sup>(4)</sup>.

Achieving this aim requires a thorough understanding of the whole range of issues that determine poverty and of the whole range of measures that may effectively address it. This also applies to the effective use of EU funding tools and instruments that may contribute to achieving the aim – among them the European Social Fund, the Recovery and Resilience Facility, and the InvestEU programme.

### What this report is about

Research shows that long-term immersion in poverty and exclusion may undermine aspirations, planning and decision-making, self-esteem and hope (Cassio, Blasko and Szczepanikova, 2021).

This often-overlooked effect of poverty may deeply impact the outcomes of interventions addressing poverty and exclusion, and it may constitute a hidden but important barrier to social mobility of individuals and communities.

This report analyses promising practices that support people affected by long-term exposure to poverty in recovering their decision-making and planning capabilities. These practices do not replace but rather complement broader measures tackling material deprivation and enabling access to services and opportunities. They can thus significantly increase the effectiveness of anti-poverty and social inclusion interventions.

### **The fight against poverty requires action at many levels ...**

Poverty is arguably the most significant obstacle to human development. Its persistence at the global level and throughout time shows that addressing it is a complex and difficult feat.

Understanding and tackling poverty requires a full examination of both its drivers and its effects, and of the complex interactions between them. As abundant evidence and research shows, poverty may be caused, and then maintained, by systemic inequalities in the distribution and transmission of resources and opportunities. Power relations, culture and group dynamics may play a significant role in the creation of mechanisms of discrimination and exclusion that affect individuals and communities. At the same time, once in place, the experience of poverty may impact capabilities; it may disempower, reducing aspirations and self-efficacy.

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<sup>(1)</sup> Article 3 TEU and Articles 9 and 151 TFEU.

<sup>(2)</sup> The goals of a carbon-neutral European economy, a Europe fit for the digital age and a “Union of equality” proclaimed in 2019 are today underpinned by a multitude of programmes and initiatives tasked with delivering on these ambitions.

<sup>(3)</sup> COM/2020/14 final

<sup>(4)</sup> Porto Social Summit conclusions  
(<https://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=10004&furtherNews=yes>).

All these elements (systemic inequalities, social environment and the effects of the experience of poverty on individuals) play a role in the perpetuation of poverty, and they are closely interrelated. While systemic injustice, often generated by group power dynamics, drives the creation of poverty and exclusion, the effects of the experience of poverty on individuals may contribute to group exclusion and also, in a vicious loop, prevent the redressing of systemic injustice, as it is more difficult for disempowered people to make their needs and claims heard and to have a voice at the table.

This points to the need for intervention at different levels. Tackling poverty requires tackling the complex systemic issues that drive discrimination and generate exclusion. This includes improving economic conditions and ensuring real access to quality education, employment, housing and health services. For people who have already fallen into poverty, it is also important to put in place measures to support individuals and families to exit it. The risk is that the experience of poverty becomes a trap, spreading and perpetuating itself across generations.

... and addressing agency and aspirations is one of them

The experience of poverty and exclusion extends to a variety of dimensions, well beyond a lack of income and employment. While the multidimensionality and complexity of poverty is increasingly reflected in research and measurement indices, the implications of poverty for individuals' inner experience are often less discussed (Bray et al., 2019).

A seminal participatory research project initiated by International Movement ATD Fourth World and the University of Oxford in 2021 asked 'experts by experience' – that is, people directly experiencing poverty and social exclusion – to identify the key dimensions of poverty and the relationships between them. The project (appropriately called The Hidden Dimensions of Poverty project) shines light on the less visible and hard to measure 'inner' experience of poverty at the individual level. In the experts' analysis, poverty entails:

- core experiences – suffering, disempowerment, struggle and resistance;
- relational dynamics – institutional maltreatment, social maltreatment and unrecognised contributions;
- deprivations – lack of decent work, insufficient and insecure income, and material and social deprivation.

Deprivations represent the most visible dimension and, generally, the dimension that is easier to measure and target through interventions. Poverty reduction measures usually focus on income support measures and on increasing access to employment, education, health and housing. Such measures are essential to address deprivations and rebalance the effects of the system on access to resources and opportunities. However, addressing only the dimension of deprivations may fall short, as the analysis shows that they are only one component of the problem. To tackle poverty effectively, interventions may need to address all the different aspects as an interconnected bundle – material privations along with sociocultural dynamics and individual disempowerment.

It is thus of great relevance to identify models of interventions that also address these more hidden, 'inner' dimensions. If disempowerment constitutes a core feature of the experience of poverty, it needs to be taken into account by policies and measures building capabilities for human development <sup>(5)</sup>.

This is all the more important when it comes to interventions targeting people experiencing deep, long-term poverty, where disempowerment has permeated the history of families and communities for generations.

Focus and aim of this report

This report focuses on a range of highly promising practices to support people in their definition of a path out of poverty <sup>(6)</sup>. They share the use of multidimensional coaching as a way to support the creation and

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<sup>(5)</sup> Here we refer to the capabilities approach conceptualised by Amartya Sen, proposing an understanding of poverty as the lack of the elements (or 'capabilities') that are necessary for people to flourish, or the lack of ability to achieve the kind of lives we have reason to value.

<sup>(6)</sup> See an outline of several examples in section II of *Poverty and Mindsets* (Cassio, Blasko and Szczepanikova, 2021).

attainment of aspirations. Such an approach does not replace other forms of support addressing material deprivation, but it can transform the way support is provided and made effective, complementing support addressing material deprivation with support addressing agency, decision-making and personal and group empowerment.

This report showcases a range of practices, synthesising their main features, key elements and enabling factors, and the possibilities that they offer. Most of the practices were found to be effective in a number of evaluations, notably those based on randomised controlled trials <sup>(7)</sup>.

This report aims to deepen the understanding and the ‘how to’ of multidimensional coaching. It intends to highlight the relevance of multidimensional coaching in broader efforts of poverty reduction, with a view to facilitating its take-up in the on-the-ground implementation of policy tools, and hence improve the broader practice of capacity building for inclusion.

It intends to support policymakers and practitioners working in the domain of empowerment and poverty reduction, by showcasing the main principles and benefits of this practice and offering possible inspiration for their own working methods.

A closer look at multidimensional coaching methodologies could open new avenues for the implementation of social development and poverty reduction actions, including under EU social investment policy and programming. Tackling the impact of persistent poverty on aspirations, hopes and decisions, alongside material aspects of deprivation, may be a game changer in improving the effectiveness of measures and policies aimed at combating poverty.

#### Methodology and structure

The content of the report stems from exchanges with leading practitioners identified at the global level, listed at the end of this chapter, who apply multidimensional coaching for poverty reduction in different contexts. They were invited to contribute because the practices that they coordinate are representative of a range of methodologies that can be used as reference.

The experts met online four times between spring 2022 and January 2023. During these meetings, they outlined and exchanged views on the theory and outcomes of their work. This structured exchange enabled the identification of their common ingredients and success factors. The report summarises the learning that took place during the deliberations and is the result of a collaborative review.

Chapters 1–3 present key features of the coaching practice that could be identified throughout most of the initiatives that were analysed. Annexes 1 and 2 outline the individual practices in detail, allowing for a more specific understanding of their methodologies and expected outcomes.

Multidimensional coaching for poverty reduction is a relatively new approach, with a growing but still limited track record of applications across the world. The selected practices represent a diversity of experience and insights. Some of them are highly codified, and others are more experimental, but all are very relevant to their specific context and aims.

While these practices are primarily aimed at supporting individuals or families, some also extend to and work with communities, in recognition of the importance of developing collective agency for social and cultural change. Working integrally, most practices are also part of interventions that address material deprivations. What they all share is a holistic approach, with the common goal of empowering clients to develop capabilities and autonomy for achieving life mobility, socioeconomic advancement and well-being, through long-term accompaniment.

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<sup>(7)</sup> See references in Chapter 1.

## Contributing experts

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## 1. Multidimensional coaching – what it is and its aims <sup>(8)</sup>

### Key points

- Coaching is a systematic, structured and intensive collaboration between the person in poverty and a mentor.
- Coaching has the dual aim of supporting people to overcome their situation of deprivation, while helping them expand awareness of their potential and develop decision-making skills and self-efficacy.
- It acts on the inner sentiment of disempowerment; it helps rebuild agency and hope and ensure a lasting pathway out of poverty.
- As poverty affects many inextricably interconnected spheres of life, multidimensional coaching addresses the entire range of needs of clients.
- During the coaching process, the person in poverty identifies their needs, and the resources and goals to improve their situation. This is a pivotal difference from top-down approaches.
- The approach fits with findings on the impact of poverty on executive functions, and on how decision-making skills can be built and reinforced.
- Coaching builds individual capabilities and self-efficacy while looking at the interaction between the person and their environment.

### 1.1. What it is

In the context of poverty reduction, coaching <sup>(9)</sup> is an approach based on collaboration and teamwork between the person in poverty <sup>(10)</sup> and a mentor (or a team of mentors/coaches) to support the person in identifying needs and opportunities and in delineating and pursuing a path out of poverty.

It is a systematic, structured and intensive intervention that may complement material support measures (e.g. cash transfers, such as welfare benefits and microcredits, or other asset transfers). It reinforces the material aid intervention by providing room for reflection, helping with the creation and attainment of aspirations, and accompanying and supporting people in expanding their awareness and capacity for self-reflection and improving their decision-making abilities in multiple dimensions of their life.

### 1.2. Theory of change

Coaching acts on the relatively hidden, but very central, feature of the experience of poverty, that is the sentiment of disempowerment that poverty creates. This sentiment has been identified by people in poverty as a central element in their experience of poverty (Bray et al., 2019). Neuroscience and behavioural research <sup>(11)</sup> also show how the experience of poverty impacts on executive functions <sup>(12)</sup>, cognitive bandwidth and aspirations.

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<sup>(8)</sup> Referred to hereafter as ‘coaching’.

<sup>(9)</sup> Throughout this report, the terms ‘coaching’ and ‘mentoring’ are used interchangeably, unless specified otherwise.

<sup>(10)</sup> Throughout this report, the person in poverty receiving the coaching is most commonly referred to as the ‘client’ of the service. We took the decision to use this term for simplicity, but it should be noted that the different coaching practices use different terminology; very often, there is a preference to refer to the person receiving the service as the ‘participant’.

<sup>(11)</sup> For a synthesis, see Cassio, Blasko and Szczepanikova (2021).

Coaching practices, such as those presented in this report, have a dual aim (Ruiz De Luzuriaga, 2015).

First, they support people in overcoming their situation of deprivation and in acquiring gains in several life dimensions (such as income, employment, housing, education and health, and also family and social relations).

Their second aim is broader and linked to core human development. By supporting clients in practising decision-making, coaching helps clients develop essential decision-making skills and self-efficacy. It supports the reinforcement of their agency and self-confidence, and also the expansion of their ability to navigate between existing opportunities and resources. This is ultimately aimed at reinforcing the socioeconomic resilience of clients, thus creating a lasting pathway out of poverty.

This is in line with the capabilities approach formulated by Amartya Sen, which became the basis for the sustainable human development approach. It considers poverty as the combination of elements that undermine the ability to achieve the kind of lives we have reason to value. Alongside structural issues of access to resources and opportunities, personal disempowerment – including a lack of agency and reduced executive functions – constitutes a crucial barrier that prevents people from flourishing.

Coaching then builds up important mindsets necessary for sustained change, including self-efficacy and motivation. This ensures that change is sustainable over time. Coaching has been described (Ruiz De Luzuriaga, 2015) as creating a sort of scaffolding for development in areas such as self-analysis and decision-making. Such support helps the client build new capabilities and practise skills until the scaffolding is no longer needed and the development continues without assistance <sup>(13)</sup>.

Constructing such functions and capabilities and accompanying people in (re)building personal agency and hope is essential to the success of any other measure aimed at helping people exit poverty, especially when they have been in a situation of marginalisation for a long time.

Through its multidimensional perspective, coaching offers a way of understanding, mapping and navigating through the different dimensions of the experience of poverty. It takes account of the inextricable interconnections between these, enabling the opportunity of charting a path towards transformative interventions.

Despite variations in their methodologies and theoretical backgrounds, the coaching practices that are presented in this report are all aimed at enabling people to envisage a future out of poverty and define a path for themselves to attain their vision, and at accompanying them to concretely follow it and achieve it. By empowering clients in identifying their needs and resources, and in setting and attaining goals for themselves, these practices allow clients to build capabilities that will enable them to lead a life out of poverty in the future.

The coaching practices analysed in this report (see detailed descriptions in Annexes 1 and 2 ) converge on many points:

- Aim to build capability and real opportunity to be and do what one values (based on Sen's capabilities approach). This is achieved by addressing the range of elements that prevent people from living a good life and enhancing clients' agency. Coaching helps clients recognise the power within themselves, power that has been there all along and can be unlocked and amplified.
- Focus on self-efficacy, by reinforcing clients' beliefs in their capacity to act to achieve given goals and exert control over one's own motivation, behaviour and social environment <sup>(14)</sup>. The purpose of the

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<sup>(12)</sup> The term 'executive functions' is used in neuroscience and cognitive psychology to indicate a set of processes that control behaviour to facilitate the attainment of goals. They relate, for instance, to the capacity to plan ahead and organise, to maintain focus and self-control, and to working memory.

<sup>(13)</sup> If the scaffolding metaphor is extended, coaching is about more than upgrading the existing structure by making it more resilient; it is also about expanding the structure upward – building a new level of self-understanding and gaining new views and perspectives.

<sup>(14)</sup> Poverty Stoplight makes explicit reference to Alberto Bandura's work as a founding theoretical framework for their practice.

coaching relationship is to identify, together with the client, sources of positive influence that can be leveraged to induce a behavioural change responding to the identified causes of the situation. Albert Bandura's two core drivers for behavioural change require an affirmative answer to the two questions 'Is it worth it?' (motivation) and 'Can I do it?' (skills), each of them with support at the personal, group and structural levels <sup>(15)</sup>.

- Need for a holistic approach that includes analysis of the environment. Reference is made to Erik Erikson's stages of development in *Childhood and Society* <sup>(16)</sup>, which looks at key turning points in the formation of personality and the relationship between individual needs and the societal context. Looking at particularly delicate moments of personality formation in a given social context is crucial for clients to sustain positive personal development and in the formation of life skills. Reference is also made to the bioecological theory of development formulated by Urie Bronfenbrenner <sup>(17)</sup>, looking at how human development is influenced by interactions with various aspects and spheres of the environment, and to Ken Wilber's 'integral theory' <sup>(18)</sup>, encouraging self-reflection and formulation of actions related to the systemic, relational and core dimensions, including intentions, behaviours, culture and systems.
- Focus on changing the environment as the ultimate goal. Some practices insist on building collective agency by helping communities recognise opportunities to change their collective situation and act together to achieve their common goals. Reference is made to Paulo Freire's work <sup>(19)</sup> and the need to build collective critical consciousness at the level of communities to drive change through awareness and mobilisation. The coach works with the clients on developing a critical understanding of their position in the social, political, economic, cultural and historical contexts as a basis for understanding that real macro improvements and system adjustments are possible, and for constructing a vision of a life 'out of poverty'.

### 1.3. A science-based approach

Research based on behavioural studies, neuroscience and counterfactual experiments <sup>(20)</sup> shows that the experience of poverty and exclusion has many negative effects on decision-making skills (executive functions). Scarcity can impact people's capacity to make decisions based on a balanced and forward-looking analysis of their situation, and negative stereotypes and discrimination can adversely alter personal motivation and self-perception.

The toxic stress and environmental conditions linked to poverty and exclusion may affect some cognitive and executive functions. In addition, the experience of poverty may be associated with lower expectations, risk-aversion and less confidence in one's capacity to acquire new competences.

Families and communities who have been marginalised over many generations may see such effects multiplied. The cumulative load of environmental factors, the traumatic impact of a prolonged experience of poverty and exclusion, and the absence of examples of social mobility in the family history and environment may increasingly undermine aspirations and affect decisions.

The research on heuristics shows how decision-making skills are built through reiterated practice over time and interaction with others. Interaction with a coach, sustained over time, may therefore allow participants to develop the capacities within themselves to move ahead.

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<sup>(15)</sup> See Bandura (1977) and subsequent work.

<sup>(16)</sup> Erikson's work is a founding theory for Hesed; see Erikson (1950).

<sup>(17)</sup> P.I.P.P.I points to Urie Bronfenbrenner's theory as a foundation for their practice: see Bronfenbrenner (1979)

<sup>(18)</sup> Referred to by Poverty Stoplight; see Wilber (2000).

<sup>(19)</sup> Poverty Stoplight references Freire (1968).

<sup>(20)</sup> As summarized in Cassio, Blasko and Szczepanikova (2021), chapters 1–4.

## 1.4. Key principles

i. Shifting the balance of power in decision-making. A pivotal element that distinguishes the coaching approach from other social assistance methodologies is that the balance of decision-making and analysis shifts from the institution providing poverty towards the client.

In the coaching approach, the client is at the centre of decision-making. The path to overcome poverty is identified by the protagonist – the person in poverty – with the support of the coach through a participative approach, rather than imposed on the person.

With the support of appropriate tools and methodology, it is for the person in poverty to analyse the situation and identify their needs and opportunities. The coach helps the client understand their available options and accompanies them in pursuing the chosen path, rather than making choices for them.

Coaching is based on teamwork as opposed to a power dynamic where the case handler has power over the client. The coach partners with the client so that they empower themselves, the final aim being to support clients' autonomy.

ii. Multidimensionality. Poverty affects many dimensions of life, especially when in place for generations.

Usually, problems are intertwined and inextricable – for instance, poor education leads to less chance of finding a good job, leading to housing problems, leading to health problems, and thus reducing employment chances, affecting chances for children, self-esteem and aspirations, etc. This means that focusing on one factor alone, such as income, is not enough to capture and address the deep issues related to poverty.

Research is in fact acknowledging that, to have a better picture of poverty, a broader set of dimensions, not only income, needs to be considered. Work is ongoing to understand and measure the multiple facets of poverty, as multidimensional poverty measures can be used to create a more comprehensive picture. They reveal who is poor and, more importantly, how they are poor – that is, the range of different disadvantages they experience <sup>(21)</sup>.

This is why the coaching practices analysed in this report address poverty through a multidimensional lens, supporting the client in the identification of their needs and in the attainment of progress over multiple dimensions, and on their own terms.

iii. A personalised pathway. People are poor in different ways; therefore, each pathway out of poverty is different. That is why it is necessary to tailor support to the specific needs, capacities and values of the clients.

## 1.5. Impact

Several practices outlined in this report (see Annexes 1 and 2 ) include rigorous impact evaluation methodologies, allowing the impact of their interventions to be quantified.

For the EMPATH (Economic Mobility Pathways) mobility mentoring programme <sup>(22)</sup>, participation in the full high-standard programme led to a 168 % average increase in annual earnings to more than USD 48 576 per year; a 94 % increase in college completion; and average personal savings of USD 3 500. Further evaluations have analysed the impact of specific aspects of the programme. For instance, goal setting (EMPATH, 2021) was found to be the most important driver of change, generating an increase of USD 303.48 in annual income per each additional goal set; with each additional goal set per month, clients were able to

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<sup>(21)</sup> See the multidimensional poverty indicator developed by the University of Oxford (<https://mppn.org/multidimensional-poverty/what-is-multidimensional-poverty/>). The Joint Research Centre of the European Commission also recently developed the multidimensional inequalities monitoring framework (<https://composite-indicators.jrc.ec.europa.eu/multidimensional-inequality>).

<sup>(22)</sup> See detailed presentation in Annex 1.



exit shelter 3.7 months earlier. Findings from another study<sup>(23)</sup> show evidence of a positive impact of coaching parents on improving child outcomes.

In P.I.P.P.I. (programma di intervento per la prevenzione dell'istituzionalizzazione; programme of intervention for the prevention of institutionalization), impact is measured using indicators such as children's and parents' participation, parental response to children's needs, reduction in risk factors and increase in protective factors. The evaluation shows that in the 18 months of intervention protective factors increase and risk factors decrease for 90 % of the families involved, and parental responses to children's needs improve in a statistically significant way. The objectives that have been designed are achieved by 80 % of the families involved, and the family is present at 80 % of the meetings where the objectives of their plan are discussed. Such presence is a crucial indicator of the effectiveness of the participative approach of the programme and the effectiveness of related training.

The Hased programme measures the impact on school readiness of children aged 3–5 years and on parental skills. Results of DAYC (developmental assessment of young children) and SER (state educational requirements) show that, although on entering the service children have achievements much lower than their peers, on leaving the service their achievements are comparable with the achievements of their peers in the general population. Children adapt well to the school environment and achieve good results in the first years of school education. An expert evaluation of parental skills at the exit of the programme proved that the programme increased parental responses to children's needs: a decrease in children's screen time, an increase in time spent by parents playing with their children and a substantial increase in knowledge about the needs of children and the main achievements for their age. In addition, 40 % of the families improved their employment situation and 80 % of families were able to pay back loans for improvements to housing conditions. The life and social skills programme showed a 10% to 30% change in attitude and a reduced rate of risky behaviour among young adolescents.

BRAC<sup>(24)</sup> evaluates results using a set of success indicators (increased asset and diversified livelihood; increased market services and social capital; improved food security and financial services; access to government services; positive behavioural change; etc.). Every year 98 % to 99 % of clients complete the programme ('graduate') in Bangladesh. A very large randomised controlled trial (RCT)<sup>(25)</sup> conducted by the London School of Economics and BRAC University found that 4 and 7 years after participating in BRAC's ultra-poor graduation (UPG) programme in Bangladesh, participants continue on an upwards trajectory out of poverty (Balboni et al., 2015). Results showed a 37 % increase in annual earnings, a 10 % increase in consumption spending, a ninefold increase in savings and a twofold increase in access to land, among other outcomes. The evaluation observed that programmes such as UPG are considered to be more cost-effective in the long run, meaning that the benefit is higher than the cost. Nobel Prize laureates Esther Duflo and Abhijit Banerjee led a multicountry evaluation (Banerjee et al., 2015) of graduation programmes across six vastly different countries and found that the graduation approach "caused broad and lasting economic impacts". A more recent study of UPG by the London School of Economics found that extreme poverty persists because people are in a poverty trap – facing extreme conditions in which multiple reinforcing barriers keep people stuck – and that graduation is one of the most effective 'big push' approaches to break the poverty trap (Balboni et al., 2022).

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(23) <https://publications.aap.org/pediatrics/article/149/1/e2020018473/183850/A-Coaching-Model-to-Promote-Economic-Mobility>.

(24) See detailed presentation in Annex 1.

(25) [https://www.theigc.org/sites/default/files/2015/12/IGCJ2287\\_Growth\\_Brief\\_4\\_WEB.pdf](https://www.theigc.org/sites/default/files/2015/12/IGCJ2287_Growth_Brief_4_WEB.pdf).

## 2. Multidimensional coaching – how it is done

The coaching practices presented in this report are based on different methodologies and pursue different specific aims. However, it is possible to present some common features in the way coaching is provided that appear crucial to delivering the expected results.

### Key points

- The starting point of coaching is a multidimensional self-assessment of needs and resources by the client (also with the help of structured tools).
- Self-assessment of the situation allows the client to define their goals for improvement. The coach/coaching team helps the client break down their goals into manageable steps.
- Through regular visits, the coach assists and accompanies the client in monitoring and achieving their progression towards the set steps.
- The coach links with support services (employment, social health, housing, etc.) that can support the client in achieving their goals.
- The long-term duration of the coaching process and the regularity of meetings are crucial to its effectiveness.
- The skills and profile of the coach are essential to the success of the coaching practice.
- Training of the coach is of paramount importance. It may be coordinated by services in charge of quality assurance.
- The coach needs to gather data on the progress of clients. Accurate data collection allows for fine-tuning and evaluation at practice level.

### 2.1. Main steps of multidimensional coaching

#### 2.1.1. Multidimensional self-assessment

A key step in the coaching process, and its starting point, is the self-assessment by the client of their situation. Each family is poor in different ways and has a different set of poverty-related issues to solve, with a different degree of urgency/priority <sup>(26)</sup>. It is crucial for clients to be able to identify what they are lacking and what they can rely on.

It is only through personal reflection on where things stand, and on their needs and resources, that a client can build a realistic project and determine meaningful goals to exit poverty.

Self-assessment is radically different from assessment by an outside person or organisation. The client must state for themselves what aspects of their life they want to work on. This ensures self-efficacy and increases motivation.

As poverty is a multidimensional issue, the self-assessment must take into account a multiplicity of areas and issues. Having a complete view of issues, needs and obstacles is fundamental. Deprivations are interlinked and have to be understood and addressed in a connected way. Difficulties in one part of someone's life can create difficulties in another.

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<sup>(26)</sup> Compare this with the description of rationale and theory of change in Burt (2019).

Building a plan to exit poverty that does not take into account all interconnected issues may jeopardise its eventual success, as the overlooked dimensions may constitute unexpected insurmountable obstacles at a later stage <sup>(27)</sup>.

A multidimensional approach is also helpful for positive goal setting, as success in one dimension can reinforce success in another. In a similar way, the multidimensional self-assessment allows for the identification of areas in which the client is not deprived; identifying the available resources and/or previous achievements can help to reframe existing deprivations and contribute to an increased feeling of agency.

With respect to the identification of the main areas to be taken into consideration for the self-assessment, the different practices analysed in the report converge on most of them.

These are:

- income and financial management;
- employment;
- physical and mental health;
- family and social environment;
- education and training;
- housing and infrastructure;
- social network and relations.

The self-assessment may also look at issues related to participation in community life, motivation and 'life planning' skills.

To support self-assessment, some coaching practices developed structured tools that help clients identify their needs and opportunities. These tools constitute a practical guide to ensure that self-assessment touches upon all necessary dimensions and that goal setting builds on the full identification of needs. These tools must be easy to understand and actionable and point to issues or dimensions that are achievable.

EMPath developed a framework (bridge to self-sufficiency, see picture in Annex) that provides a very clear and practical orientation of what self-sufficiency looks like in practice. This tool helps chart a path to economic self-sufficiency by helping families plan, reach and sustain their personal goals in five essential areas: family stability, well-being, education and training, financial management, and employment and career management.

Poverty Spotlight developed a digital self-evaluation survey based on colour coding (see examples in Annex), where clients select their level of poverty (red for extreme poverty, yellow for poverty, green for no poverty) across a number of indicators (typically 50 indicators, although the number varies across adaptations), looking at six dimensions of well-being. Both clients and coaches can monitor progress with the easy-to-use and readily understandable application.

P.I.P.P.I. proposes that all the members of the family (parents and children at least) carry out a self-assessment, accompanied by professionals, to better understand their situation. The methodology <sup>(28)</sup> focuses on three aspects: children's needs, parenting skills and environmental factors.

### 2.1.2. Goal setting by client

Following their self-assessment, clients define their own goals for improvement.

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<sup>(27)</sup> According to Territoires Zéro Chômeur de Longue Durée, "we do not want them to face another failure (that would be dramatic). So we have to work on every hurdle that could prevent the persons to succeed in a job, before we offer them one". See detailed presentation in Annex 1.

<sup>(28)</sup> The methodology is inspired by the British framework for the assessment of children in need and their families (DoH, 2000).

It is essential that goals are defined by clients, with the support of coaches, rather than the other way round (goals imposed by the social service on the person in poverty). This is precisely what makes coaching different from other, top-down social assistance practices.

The self-identification of goals is crucial to attain the deep aim of coaching – that is, to enable clients to develop executive functions and build self-confidence, and also to develop their capacity to aspire and demonstrate to themselves their capacity to attain those aspirations <sup>(29)</sup>.

Goal setting is a main driver of outcomes, and evidence shows that it is more important than the number of meetings <sup>(30)</sup>.

The process of coaching supports clients in breaking down their goals into attainable steps and achieving them over time. The outcomes of goal setting are influenced by aspects such as difficulty and specificity. Overly simple goals fail to motivate individuals to achieve positive results, while overly complicated goals challenge self-efficacy and yield low performance. Moderately difficult goals show the best effects on motivation and performance. Conflicting goals also impede progress towards desired results.

The EMPATH bridge to self-sufficiency supports goal setting by giving a practical orientation on what they may look like. Each pillar/dimension of the tool shows what the final goal may be, but also a range of intermediary situations. This helps the client identify where they stand and the direction that they might take. Each broader goal is then segmented, with the help of the coach, into smaller and achievable steps.

The aim of the framework is also to improve tangible life circumstances while creating improvements in the decision-making skills necessary to consistently and successfully set and achieve personal goals. These skills include future orientation, personal agency and growth mindset, problem-solving and strategic thinking, and behaviour management and self-regulation.

In the Poverty Stoplight model, upon completion of the survey, the mentor guides the client through a ‘life map’, where strengths and areas for improvement are identified. The client chooses some indicators as priority areas for improvement and works together with the mentor on strategies to set specific goals and design a plan to achieve them. The life map guides clients to understand their situation, to understand that opportunities for change exist, to discuss and register their priorities and to commit to a level of involvement. Follow-up mentoring sessions are used to check on (and celebrate) progress, make changes as necessary or brainstorm on alternative strategies.

In P.I.P.P.I., the assessment process is strictly connected with a project plan process. The aim is to build a change that is co-decided and co-designed with the entire family. The development of the plan is in turn co-designed with the family and the multidisciplinary team co-building it. This is achieved by adapting and tailoring a standardised methodology developed through research and experience (‘participatory and transformative evaluation’) to the specific needs of the family so that it becomes a personalised plan.

The attainment of goals is supported by providing information and expertise, and networking with local services. The role of the coach is on the one hand to support clients in the definition of goals, and on the other hand to accompany and support them in the attainment of the set goals.

In practice, this means that coaches spend substantial time with clients to support them in the steps that they need to take, and that they provide information and guidance on things such as bureaucratic procedures, applications and job searches.

In the BRAC UPG programme, visits involve guidance and technical assistance on enterprise development and financial management, and discussions on health and social issues, such as family planning, vaccination, food

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<sup>(29)</sup> According to Territoires Zéro Chômeur de Longue Durée, “making people participate into the definition of their future job encourages a dynamic of mobilization, improving the well-being of individuals, reconnecting with a collective spirit, and collaborating to implementing experimentation.”

<sup>(30)</sup> A recent research evaluation conducted for EMPATH shows that each additional goal set was associated with gains in income for clients with stable housing and faster exits from shelter for clients in homeless shelter programmes. Additional goals were also associated with increases in overall self-sufficiency and improvements in mental health; see EMPATH (2021).

and nutrition, early marriage, dowry and domestic violence. Frontline staff also make sure that the children of the households are going to school and, where appropriate, link the child with skill training facilities. They encourage self-employment of the women participants through livelihood promotion and financial inclusion, and provide suggestions and guidance related to cleanliness of the household, how to build a sustainable household, and establishing safe water and sanitation facilities. Dedicated coaching sessions are also held with the men and boys of the households. In these sessions, discussion is held on gender norms, gender equality and women's empowerment. The male members are encouraged to themselves encourage the participant to take gender non-stereotypical livelihood opportunities, to get involved with the participant's enterprises and/or have his own enterprises/business. They are also encouraged to take part in household chores and care duties.

### 2.1.3. Networking with existing services and resources

Connection and working in tandem with existing services that may support the clients in many areas is essential. The coach provides information on available public, private and non-governmental organisation (NGO) services (welfare, healthcare, job centres, etc.), and connects clients with those services, and also to other available community and public support systems.

Territoires Zéro Chômeur de Longue Durée, which is mainly focused on employment, cooperates with local actors to guarantee the effectiveness and sustainability of the coaching intervention. Some aspects of the coaching are validated by a local committee for employment, composed of mayors, local business executives, civil associations, persons permanently deprived of employment and state representatives.

For hela familjen<sup>(31)</sup>, which is focused on breaking the intergenerational transmission of poverty and on child protection, collaborating with the whole professional network supporting the family is crucial. This includes school staff, healthcare practitioners, career coaches and social workers specialising in, for example, family counselling.

P.I.P.P.I. invites the child's school (kindergarten, nursery or primary school) to be a full member of the multidisciplinary team working with the family. In addition, P.I.P.P.I. recognises the importance of complementing the support provided by formal services with support generated in informal community networks. For this reason, each client family is supported by a family from the community, who plays the role of natural family helper, in coordination with the multidisciplinary team.

### 2.1.4. Regular meetings/visits

A key feature of the coaching process is the establishment of a strong relationship between the client and the coach, based on regular contact and meetings. The frequency of interactions between the coach and the client varies between the various practices. In most practices, optimal engagement is one meeting per month as a minimum, and possibly more (weekly or biweekly), especially in the initial phase. Frequency is very important, especially if clients' attitudes are not conducive to engagement at the start of the programme; some research (Currie et al., 2001) even recommends several coaching contacts per week. Frequency and regularity matter a lot in establishing the necessary trust for a productive coaching relationship (Eby et al., 2008).

The motivation of the client is maintained by knowing that the coach will check in with them. The follow-up must be regular and predictable; every step or action must be followed up in a pre-determined way. A system to measure progress must be built in; the coach must also follow up in a timely way on any tasks they are responsible for, in order to show the client that accountability goes both ways. The process is crucial to building self-regulation skills (Ruiz de Luzuriaga 2015).

In BRAC's UPG programme, coaching is provided to the participants through fortnightly home visits and group visits. Both group and home visit sessions are followed by several sequenced steps. Visits follow a structured schedule, which can be adjusted based on participants' needs.

In hela familjen Malmö, the main focus of the coaching practice is on building strong relationships with participants. This is realised through regular sessions, which help put the focus on the children and their well-

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<sup>(31)</sup> See detailed presentation in Annex 1.

being. Another focus is identifying the needs of the client and then motivating them to take the necessary steps to overcome their issues. The practice usually starts with a visit in the home environment.

P.I.P.P.I. provides homecare in which the coach meets with the clients approximately twice a week for a minimum of 4 hours a week. In addition, clients are involved in regular group activities with other parents to help improve their parental skills, such as decision-making, problem-solving and the organisation of daily life. Parents' group meetings are often supplemented by children's group meetings. These group meetings are mainly held in modules. Weekly or biweekly meetings with an average duration of 2 hours are held for 8 weeks.

### 2.1.5. Accompanying in the long term

When poverty is deeply entrenched, getting out of it requires time and patience. A short, one-off intervention cannot suffice.

The role of coaching is to accompany clients over time, and continuously check progress with clients, thus supporting and encouraging them.

All the practices insist on the importance of a long-term approach. In general, most interventions last at least 1 year, but generally longer. For example, EMPATH recommends that coaching last 3 years or more. Beginning just after the asset transfer, the BRAC cycle of hands-on coaching lasts on average 18 months within the 24-month programme cycle. P.I.P.P.I. intensive interventions last 18 months.

## 2.2. Coaching for whom?

There may be different models of coaching programmes for people in poverty. They may be designed to address individuals or families, and also broader communities in highly segregated settings.

The practices analysed in this report target different groups, depending on their specific aims. Clients typically are people with very low income, who find it difficult to access quality employment and overcome financial barriers without some additional help. In most cases, clients bear the consequences of multiple issues; besides unemployment / lack of decent work, they may be confronted with language barriers, poor physical health or mental health, debt, history of trauma, housing issues and discrimination of various kinds <sup>(32)</sup>.

Participation in coaching programmes may be voluntary or may be a condition for accessing welfare benefits.

### 2.2.1. Individuals

Some practices target adult individuals, focusing on their specific needs and with a strong orientation to employment support <sup>(33)</sup>, while other practices <sup>(34)</sup> take account of the multiple dimensions of a person's well-being, including the situation of the family. However, there is often just a thin line between targeting individuals and families, as the two dimensions are closely interrelated <sup>(35)</sup>.

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<sup>(32)</sup> The ATD Fourth World report, developed based on international participatory research, maps the nine interlocking dimensions of poverty, including material deprivations and core experiences, and relational dimensions, including unrecognized contribution, and social and institutional maltreatment.

<sup>(33)</sup> Territoires Zéro Chômeur de Longue Durée mainly supports people in their quest for employment. This practice is tailored to building individuals' competences and self-esteem, and to addressing a wide range of issues that affect their job search.

<sup>(34)</sup> For example, the EMPATH mobility mentoring programme.

<sup>(35)</sup> BRAC's ultra-poor graduation programme focuses on women participants, although it utilises a household approach so that the benefits of supporting them can trickle down to the entire family and possibly community.

## 2.2.2. Families

Evidence shows that poverty and disadvantage, but also a sense of disempowerment and ‘external locus of control’, are usually transmitted across generations. This is why several practices target the whole family, with a strong focus on children, in order to break the poverty cycle. Parenting support may be essential to ‘break the cycle of social disadvantage’<sup>(36)</sup>.

Child and family welfare are closely linked<sup>(37)</sup>. This represents a pivotal mindset shift, from blaming parents to understanding and addressing issues of lack of support to families<sup>(38)</sup>.

Addressing the family does not mean treating it as a single homogeneous entity. Families are composed of individuals who often have different aspirations and needs. Therefore, the assessment of needs, aspirations and resources is conducted individually (and separately) for each member of the family.

## 2.2.3. Communities

In close-knit and segregated communities who face discrimination and disempowerment as a group, some practices intervene through community coaching. This approach leverages mechanisms of peer support / pressure by reinstilling hope and showing useful ways to address issues. The aim is to support the community to self-organise and to shift from a passive to an active community.

These practices recognise that poverty in the community is not only a lack of material goods but also a lack of social connections and information. The coach works with community members and local authorities to analyse needs and build capacity.

The BRAC UPG programme, while targeting women and households, insists on the importance of group visits to drive change in the community.

Hesed works with Roma communities to develop personal and community potential and achieve change by addressing norms in the community. By supporting families in developing parental competence, and children and adolescents in their education and social development, it aims to create role models that show the way to a better life for the whole community, one family at a time.

The ROMACT programme and the United Nations Development Programme (UNDP) local development approach, which are used in post-conflict situations and situations of poverty, exclusion and disaster, recognise that local socioeconomic decline results from a lack of local initiatives, social cohesion, and knowledge, information and know-how. Thus, community coaching is a tool for mobilising agents and resources for development. Its aim is to reach all stakeholders in the target area, to encourage them to act, reach their full potential and accumulate social capital through their cooperation. It enhances local/territorial governance and participation, helping to develop effective interventions and solutions that local people can own.

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<sup>(36)</sup> 2013/112/EU: Commission Recommendation of 20 February 2013 Investing in children: breaking the cycle of disadvantage (OJ L 59, 2.3.2013, p. 5).

<sup>(37)</sup> P.I.P.P.I., originally conceived as a child support programme, evolved as a whole enhancement measure for families with children in a situation of vulnerability and poverty. Furthermore, the introduction of a minimum income provision in Italy in 2017 acknowledged the importance of accompanying income support with a reinforcement of social services provision. Decree Law 147/2017 and Decree Law 4/2019 stipulate that families who benefit from income support are also entitled to a multidimensional assessment of needs. The P.I.P.P.I. methodology is the basis for such assessment. Therefore, the experience of P.I.P.P.I. led to the definition of guidelines for ‘social inclusion pacts’ between services and beneficiary families and to the creation of series of assessment instruments in support of its implementation.

<sup>(38)</sup> The hela familjen programme in Malmö also supports vulnerable families with a view to reinforcing the foundations for the children's future.

#### Box 1. The specifics of community coaching

Community coaching is different in nature from coaching individuals and families, but it has some characteristics and strategies in common. Community coaching mobilises and prepares passive communities and their members to become actors in their development, exploiting their full potential and supporting them to accumulate social capital by working together, including those most vulnerable in the community.

The basic steps of the community coaching process are as follows:

- the mobilization phase – laying the foundation, creating connection, building trust between the coach and community members, mapping partners and ideas, organising group discussions to identify common understanding of needs, resources and visions, communication and mediation;
- the capacity development and planning phase – fostering (re)organisation and self-representation, participatory planning, implementing small common actions, establishing/strengthening partnerships;
- the change-making phase – improving self-organisation, empowerment, leadership, connecting to other initiatives and networks, implementation/monitoring of commonly agreed plans.



## 2.3. Who are the coaches? What is their profile and what is expected from them?

Coaches are essential actors of interventions. They are the face of the programme for participants. They support clients in their self-assessment, motivate them in the identification of goals and monitor progress. The coach's role is to help clients believe in their potential, recognise and reinforce their skills and strengths, and use those strengths to achieve progress in their respective 'improvement areas'. Coaches help clients increase their self-confidence and encourage sustainable behaviour change.

### 2.3.1. Skills and qualifications

Their profiles and training are thus key to the success of programmes.

Coaches are usually recruited as regular staff. They are hired using competitive selection processes; they can be existing public employees who voluntarily apply to become a coach, or they may be hired as a coach by private/non-profit organisations.

They may work in an individual relationship with the client or be part of a team.

They receive specific training, and their work is supervised and supported at a higher level. The coordination of coaches is usually carried out by more experienced staff in charge of quality assurance (verifying the correct application of the methodology, supporting the identification of clients, preliminary assessment, use of tools, aggregated data collection, etc.). Often supervisors are in charge of induction training of the field coaches.

A key task that is normally required of frontline coaches is accurate data input and review to monitor the progress of clients. This is usually done in a digitised way, through a structured monitoring system.

With respect to the optimal profile of a coach, experts agree on the following characteristics:

- qualifications / prior experience as specialised social workers, psychologists or hands-on practitioners;
- adequate education level – the coach should be educated to at least the level that they will coach clients to attain;
- motivation, drive, and ability to convene people to solve problems;
- knowledge of local context/community, because sharing the language, race and culture of clients is often an advantage – the coach can then be a role model, which also facilitates acceptance within the community;
- knowledge and connection with local services – the coach must be aware of all available relevant social services, to be able to guide clients to apply for / make use of these services;
- communication and listening skills;
- sensitivity, compassion and empathy;
- flexibility, patience, respect and tolerance;
- openness and ability to learn;
- sense of responsibility and reliability;
- understanding of confidentiality, neutrality, objectivity and non-judgemental attitude.

Further crucial characteristics of coaches are a 'growth mindset', being convinced of the potential of clients and holding high expectations / personal regard for clients (Babcock, 2018a).

At the same time, coaches must be able to set psychological boundaries for themselves, and not be emotionally overwhelmed by the complexity of the challenges faced by their clients. Coaches must understand the importance of self-care to deal with stress – for themselves and for clients. Coaches will be most successful at coaching clients on this if they themselves practise healthy, consistent self-care.

### 2.3.2. Training

Given their key role, providing adequate training to coaches is a fundamental component of all practices. Training ensures that coaches correctly apply the programme methodology and are equipped to face the complexity of the situation.

Training generally consists of a mix of modules and activities, including intensive online or in-person courses, interactive lectures and field visits, job shadowing and on-the-job and peer training, supported by managers. The training is usually complemented by ongoing supervision by trained supervisors.

Training includes elements of context analysis, capacity building and training on coaching techniques, information on the topics that are likely to arise during implementation, and use of programme documentation and support tools <sup>(39)</sup>. It often includes theme-based case studies and a focus on particular topics <sup>(40)</sup>.

Depending on the size of the organisation, training can be given in a cascade system: training for the trainers at central level, and decentralised training of local field workers by supervisors <sup>(41)</sup>.

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<sup>(39)</sup> EMPath suggests that all coaches should receive training in the impact of stress on the mind, emotions, behaviour and health, trauma and its effects, boundary maintenance, engaging clients in self-assessment, goal setting, motivational interviewing, unconditional positive regard, finding and sharing resources in the community, self-care and active listening.

<sup>(40)</sup> For example, in the hela familjen programme in Malmö, gender equality, effective motivational sessions, children's rights and methods to measure success.

<sup>(41)</sup> This is the case for Poverty Stoplight and BRAC. In P.I.P.P.I., the structure has three layers. Coaching is carried out by multidisciplinary teams, and, in every municipality participating in the programme, two coaches coach the multidisciplinary teams. In turn, they are coached and mentored by the programme developers in full-day training sessions that take place every 3 to 4 months. EMPath provides online training courses for mentors and supervisors, and also train-the-trainer programmes for affiliated organisations large enough to warrant it.

### 3. Enabling factors and transferring practices

#### Key points

- Coaching represents a shift in social assistance delivery, as it requires a move away from compliance and control to partnership between people in poverty and social services.
- Effective coaching requires an inner conviction that success is possible and having high expectations for clients. To be able to build such expectations, clients in turn need to be exposed to examples of success.
- Coaching may be easier and more effective if it uses some structured tools to support the identification of needs and goal setting, as well as monitoring.
- The multidimensional approach may enable support services to work better in a network and overcome the recurrent problem of segmentation of services.
- When poverty is deeply rooted in family history, progress requires time; coaching should be seen as a long-term process.
- To transfer and scale up the measure, a progressive approach may be recommended. The programme needs to be adapted to the specific context and needs of the community where it is applied.
- Ideally, the implementation of the project would involve coaching implementing organisations in a sort of parallel process.
- Just as in the case of the people who are coached, the implementation should also be more effectively based on a principle of trust-based accountability, by supporting implementing organisations to set their own goal, and using process measures as a means to evolve the practice.

The deliberations of the group of experts for the preparation of this report pointed to some important features that may enable success for the multidimensional coaching practice.

#### 3.1. A pivotal shift in social assistance delivery: from compliance to partnership

As opposed to the classic top-down social assistance model, where the social worker gives directions and ensures compliance, the coaching practice consists of a partnership in which the process is directed by clients. It replaces extrinsic motivation (compliance with set obligations, in fear of losing welfare benefits) with the creation of intrinsic motivation, led by expectation and hope for improvement.

For the implementing institution, changing the social assistance service design from compliance to partnership may be difficult, as it requires a pivotal change in approach. It means trusting the clients – thus essentially sharing power with the people they assist. This may seem risky, but the evidence on the flaws of the compliance-based model and on the ‘stickiness’ of poverty may make it necessary to look for other ways to deliver welfare services. The evidence of success of coaching practices should give confidence that it is feasible. Ultimately, the benefit of changing approach is giving back dignity to people in poverty.

#### 3.2. Changing the narrative about success and building expectations

A key purpose of coaching is to enable clients to imagine change and build positive expectations about their future. This may be difficult for people who have experienced repeated failures, who are immersed in an environment where most people are also in poverty and for whom examples of social mobility are not present.

Therefore, the mission of the coach is to help clients create a positive re-imagining of what is possible, supporting them to see their strengths and resources, and also to rebuild a positive self-image.

It is also essential that coaches, and the programme as a whole, offer clients positive examples of people who were in similar situations and who succeeded in achieving their goals. Telling stories of success can be done through both communication material (posters, leaflets) and actual peer group learning. Having coaches who share some characteristics with the clients may also greatly benefit the effectiveness of the practice.

To be able to convincingly support clients in building positive expectations for their future, it is essential for staff and coaches themselves to have a 'growth mindset' and be convinced of the clients' potential<sup>(42)</sup>. It is therefore essential for the programme to showcase success and demonstrate that change is possible.

Shifting the perspective and pointing to evidence of success is not only important for clients; it is also a core element of the effectiveness of the coaching programme. Examples of success are important for social workers who become coaches. Having worked with people in difficult situations, they may have suffered from several frustrations in the past. However, they need to have a positive image of their clients. Evidence that their work contributes to improving the lives of people builds empathy and gives energy, thus ensuring that the coaching programme is more likely to work.

Evidence of success is also crucial for institutions, to see that a different approach from a compliance-based one is possible.

Finally, evidence of success is of the utmost importance for local communities and society, to enable them to take a different view on people in poverty and change perspectives.

### 3.3. Benefits of a structured framework

Several practices described in this report<sup>(43)</sup> use a structured tool to help clients assess their capabilities (needs and assets), define their goals on multiple dimensions and visualise the steps that would allow them to achieve their goals.

The use of such tools has many benefits, as it enables the measurement of impact/progress at an individual, programme, organisational and even network level.

For the client, the framework facilitates awareness and recognition of needs and issues.

For both the client and the coach, the framework provides a good structure for the coaching intervention, as it allows for easier identification of goals that can then be broken down into small steps. It enables a constant monitoring of progress by both the coach and the client.

And, importantly, while progress takes place through many small, sometimes apparently imperceptible steps, the framework helps maintain the focus on the big picture and the ultimate goals.

Finally, the use of a structured framework also allows a broader assessment of impact at the programme level.

### 3.4. Multidimensionality as a catalyst to address segmentation of services

Multidimensionality is an indispensable feature of the practices presented in this report. Indeed, aiming for 'human flourishing' in the broad sense of the capability approach involves looking at the whole range of deprivations that may hinder a person from developing their potential.

This is because poverty and exclusion are complex issues that inevitably affect several areas of life. Furthermore, improvement in one dimension of deprivation may trigger positive effects in other areas, if adequately accompanied.

Multidimensionality also means that the coach needs to be in a position to liaise with different services and professionals (in education, employment offices, healthcare, housing, municipal services, etc.) to adequately help the clients in their efforts. This requires as a minimum that the coach has all the relevant information and contacts, and experience of collaboration with the key services.

Given the complexity of the role, coaching may be carried out with the support of a multidisciplinary team who can provide the specific information and guidance<sup>(44)</sup>.

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<sup>(42)</sup> For the science behind expectations, and for practical guidance on how positive expectations may be built into the programme, see Babcock (2018a).

<sup>(43)</sup> EMPATH mobility mentoring, Poverty Stoplight and P.I.P.P.I.

Ultimately, the coaching intervention strives to overcome the often-observed segmentation of support services, whose integration/better interconnection is crucial to adequately support people in poverty.

### 3.5. Long-term work to enable a generational change

The coaching practices presented in this report target mainly people who are in a situation of persistent poverty, often going back several generations. Their aim is not to provide short-term relief, but to ensure sustainable and long-term change and to break the transmission of poverty to the next generation.

Coaching is based on trust. Spending time with people and creating relationships and trust is essential to support and accompany change. This also means that coaches need patience and to understand that the way out of poverty is not always linear.

All this requires time. Issues that have been rooted for a long time cannot be expected to be resolved with a short-term intervention. Coaching aims to support people in their decision-making through repeated assisted practice, until they have internalised it and are autonomous. This may take several years <sup>(45)</sup>.

### 3.6. Phasing out: removing the scaffolding

Coaching is a sort of scaffolding that helps clients acquire the behavioural change they need, until they do not need this support anymore because they have internalised it (Ruiz de Luzuriaga, 2015). Over time, the scaffolding naturally falls away. Clients at this stage will often attend coaching sessions having already set their next goals prior to the meeting. Phasing out takes place when clients are autonomous in their goal setting and attainment <sup>(46)</sup>.

### 3.7. Scaling up and adapting to the context on the basis of key principles

Organisations aiming to implement multidimensional coaching may want to start with pilot projects at the local level, and then progressively scale it up. This can help shift the mindset of frontline workers and policymakers, ensuring that a holistic mindset grows and takes hold in the support service, building a strong foundation for this new approach.

Annexes 1 and 2 outline sets of practices that are already in use, some of which have been replicated widely, along with their key principles and processes. While these practices differ, they share common fundamental principles and processes. Policymakers and implementers should keep these principles in mind and test them against local circumstances when designing new specific initiatives.

Successful multidimensional coaching programme development is always specific to the population, context and needs. Therefore, it is necessary to continually adapt and revise the methodology based on the specific needs of the community or group in which it is applied. Even if methodologies are well codified, adapting each specific methodology to different contexts involves deep reflection on the meaning and implications of poverty in that specific environment. Adaptations must necessarily be made around local conditions and optimised for the strengths of local resources and capabilities.

What matters is that adaptations take into account the key principles summarised in previous chapters. These principles include giving clients a central role, allowing them to set their own goals based on a

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<sup>(44)</sup> P.I.P.P.I. teams are composed of at least a social worker, an educator, a psychologist and the child's teacher. Hesed also emphasises the importance of multidisciplinary teams in its integrated community centres.

<sup>(45)</sup> In EMPATH's guidance, 3 to 5 years is desirable.

<sup>(46)</sup> The BRAC practice dedicates substantial focus to phasing out, which is seen as a fundamental and delicate stage. In the last few months of receiving hands-on coaching, participants are accompanied with particular care; they are informed of options for further support and linked to other programmes, services and networks. Phasing out is when coaches underline clients' success and make them aware of the progress achieved, to build their self-esteem and determination for the future.

multidimensional analysis of needs, building trust and respect in a partnership approach, getting everyone on board through an integrated approach, and working with a long-term perspective.

Ultimately, the key point is that introducing multidimensional coaching requires a change of mindset in the design and implementation of social inclusion measures towards a more collaborative, person-centric, empowerment approach.

This mindset shift may also extend to the way organisations and their funding work.

### 3.8. A parallel mindset shift for organisations: conceiving evaluation as a support to evolution

The founder of EMPATH, Elisabeth Babcock, recognises that shifting to a coaching model may require a parallel mindset change for implementing organisations and their funders.

Implementing coaching for people in poverty requires a shift from a top-down indication of what is good for the participant to a partnership mindset, with active goal setting by the participants themselves.

Likewise, shifting to a partnership approach between implementing organisation and funder may be crucial to the success of the programme.

Traditionally, funders set objectives for organisations implementing social objectives, which focus more on outputs and outcomes (such as how many people will be employed at the end of the project) than on key processes. If the set outputs/outcomes are not reached after a certain (and usually rather limited) amount of time, the whole process is discarded, based on the assumption that the whole project design was wrong. This risks conflating design with implementation problems, thus overlooking the possibility that the issues concern the implementation rather than the design. This approach can lead to frustration and loss of energy, as it does not allow for precise analysis of what aspect of the design or implementation might have caused failure and what might be improved.

Organisations working to support people in poverty typically have an earnest desire to be effective in their practices. Focusing on shared learning to enable improvement and evolution, rather than on top-down assessment of success, may be crucial to avoid frustration and maximise impact. This focus on shared learning would lead to ‘learning organisations’ and ‘learning funders’. Accompanying organisations on this learning journey means accepting that failure is possible and looking at it as a learning opportunity. It also means implementing an iterative process that constantly analyses what is working and what is not, and how to do it better.

Such **“trust-based accountability”** approach offers freedom to organisations and the opportunity to develop effectively, and it supports them in learning how to evaluate their own work – thus shifting from a system of (top-down) evaluation to one of (joint) evolution.

Shifting to an approach where organisations are able to set goals for what they want to accomplish and how to achieve it, as opposed to having goals determined in a top-down manner by funders, requires a deep recalibration of programming and of the way success is measured.

Funders need to know if what they are supporting is worthwhile and effective. Focusing on process measures may help identify and improve issues. Monitoring progress can be done by creating a shared vision that is broken down into smaller goals and milestones.

Data are crucial for evaluating progress, but it is important to shift from a punitive approach to a supportive one. This can be achieved by working in partnership to fine-tune and develop work while using data to support improvement.

Organisations should be empowered to decide on their own goals, defining their vision for success and setting expectations for progress. For example, an organisation may have a vision of enabling all minority students to enter college just like non-minority students. This vision should be used to define a strategy, identify what needs to be measured and establish how to collect evidence of progress. These self-established goals become the measurement reference for evaluation.

Research indicates that the process of setting goals is the main driver of change. Therefore, the focus of a ‘trust-based accountability’ process should be on how the organisation reflects on the desired change, how

many goals it sets itself and how it monitors and implements them. Goal setting itself can be a measure for evaluation.

EMPath exemplifies this approach by gathering information on partner organisations' activities through regular surveys and then sharing the aggregate data on what works and what is less effective to support the refinement of their partners' work. The data collected are used to compare processes and help everybody get it right. Thus, the data become a resource that members of the network use to evolve.

### 3.9. How to make the change last?

Policies and programmes are often subject to changes, including as a result of political cycles. This may constitute a major issue for initiatives and methodologies that need to establish long-term partnerships and trust.

The experts recommend thinking about this from the outset. In particular, BRAC underlines the importance of thinking in terms of resilience – of both the participants and the programme itself.

For participants, multidimensional coaching contributes to building confidence, and thus enhances resilience to shock over the longer term.

At the programme level, sustainability requires anchorage. Ensuring visibility and publicity from the outset can support the anchoring of initiatives and make it harder to reverse them during political cycles. Identifying a broad range of strong, stable partners is also crucial to ensuring stability over time.

## Conclusions

The examples outlined in the report demonstrate that poverty reduction measures may be more effective when they address the impact of persistent poverty on aspirations, hopes and decision-making, in addition to material aspects of deprivation.

In particular, the report highlights the potential of multidimensional coaching as a complementary intervention for socioeconomic empowerment and inclusion of marginalised people. By enhancing decision-making capability and agency, and expanding awareness, this approach addresses the hidden impact of persistent poverty and exclusion – a dimension that is often overlooked by traditional active inclusion policy interventions.

Multidimensional coaching represents an innovative methodology that can increase the impact of traditional social inclusion measures, such as income support, social infrastructure and access to the labour market. When implemented in a thorough way and inserted into broader support measures, it may be a game changer for poverty reduction measures.

The report showcases the experience of several multidimensional coaching practices worldwide, which have been the innovators and early adopters of this practice. These practices have demonstrated substantial and tangible outcomes.

We hope that this evidence will encourage more decision-makers and implementers at the EU level and, above all, national and local levels to adopt and integrate this approach into their social inclusion strategies, policies and programmes, taking inspiration from the initiatives outlined here.



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## Annex 1. Outlines of multidimensional coaching practices for individuals and families in poverty

## BRAC ultra-poor graduation programme: graduation approach



<http://www.BRAC.net/program/ultra-poor-graduation/>

### What is it? Background and aims

BRAC is an international development organisation originally based in Bangladesh. In 2002, BRAC pioneered the 'graduation' approach – a research-based multidimensional approach to combat extreme poverty, and started implementing it in Bangladesh through the ultra-poor graduation (UPG) programme.

The graduation approach consists of systematic, structured and intensive 'hand-holding' coaching. It is based on a comprehensive, time-bound and sequenced set of interventions to enable ultra-poor households to achieve key milestones towards sustainable livelihoods and socioeconomic resilience in order to escape extreme poverty. Grounded in four interconnected pillars – livelihood promotion, financial inclusion, social protection and social empowerment – the elements of the UPG programme are targeting, enterprise development training, asset transfer and interest free loans, hands-on coaching, savings, healthcare and government safety net services, community mobilisation and graduation.

Hands-on coaching is one part of a larger set of actions, but it is considered the crucial element for the long-term success of the graduation approach. The aim of coaching is to help participants unlock their potential, instil confidence and enhance skills. It enables participants to envisage a future out of poverty, understand their rights and avail of government and other mainstream services.

### How does it work?

In the UPG programme, hands-on coaching is provided to the participants through fortnightly home visits and group visits by frontline staff of the organisation.

The hands-on coaching process starts after participants receive assets (for instance, livestock) in the framework of the programme.

It consists of structured and timed group and home visits taking place every 15 days. Each participant receives two group visits and two home visits in a month. Both group and home visit sessions are followed by several sequenced steps. Visits follow a structured schedule, which can be adjusted based on clients' needs.

Hands-on coaching aims to ensure enterprise growth and management, enhance the client's decision-making and future planning skills, build confidence and raise awareness of relevant health and social issues. As it addresses the multidimensional nature of extreme poverty, hands-on coaching includes a multifaceted set of activities, addressing multiple dimensions.

The visits involve guidance and technical assistance on enterprise development and financial management, and discussions on health and social issues, such as family planning, vaccination, food and nutrition, early marriage, dowry and domestic violence. The frontline staff also make sure that the children of the families are going to school and, where appropriate, link the child with skills training facilities. They encourage self-employment of the clients through livelihood promotion and financial inclusion, and provide suggestions and guidance related to the cleanliness of the household, how to build a sustainable household, and establishing safe water and sanitation facilities. Dedicated coaching sessions are also held with the men and boys of the households. In these sessions, discussions are held on gender norms, gender equality and women's empowerment. The male members are encouraged to themselves encourage the participant to take gender non-stereotypical livelihood opportunities, to get involved with the participant's enterprises and/or have his own enterprises/business. They are also encouraged to take part in household chores and care duties.

The coach also provides information related to available public, private and NGO services, such as social safety nets, livelihood and healthcare, to the participants and links them with these services, and also to available community and public support systems.

Frontline staff work under the supervision and with the support of branch, regional and zonal teams and technical staff. While following a structured pattern, the coaching method may be tailored to participants' needs, capacity and knowledge.

The hands-on coaching continues over the course of the 24-month programme cycle, beginning just after the asset transfer, with each participant receiving a 20- to 25-minute discussion with frontline staff in each home visit.

In the last few months of the programme (phasing-out period), participants are accompanied with particular care; they are informed of options for further support and linked with other mainstream programmes, services and networks. The frontline staff also underlines the participants' success and shows them the result of their hard work, courage and determination.

In a process of continuous learning, the methodology is constantly updated and adapted, following the collection and analysis of data on context and needs, and piloting of different approaches. Data collection, tracking of participants' progress, and supervision and reporting are now fully digitalised.

Concerning costs, the programme costs approximately USD 450 per participant, including hands-on coaching and other services, for the 24-month programme cycle.

Where is it applied? By whom?

Since its inception in Bangladesh, the graduation approach has been widely adapted for different contexts and various populations, such as rural, urban and climate change-affected areas, persons with disabilities and host communities in the refugee context. BRAC's UPG programme in Bangladesh has reached over 2.1 million ultra-poor households across 48 districts. Currently it is implementing interventions in 39 districts in Bangladesh with high poverty and climate vulnerability. The hands-on coaching component has been adapted in all these interventions based on the context and need. For example, in the disability-inclusive UPG programme, hands-on coaching includes well-being through psychosocial and rehabilitation support, while in the climate change context awareness on disaster management is considered a very important part of hands-on coaching.

BRAC implements the UPG programme by itself. The UPG programme's own frontline staff provides the hands-on coaching to the participants. Regional, zonal and branch teams provide support to the frontline staff. Branch managers also visit the participants to track progress on a regular basis (monthly) based on their action plan.

Inspired by the success of the UPG programme and in an effort to address poverty across the globe, the World Bank's Consultative Group to Assist the Poor (CGAP) and the Ford Foundation started piloting graduation projects in eight other countries. BRAC provided technical support for implementing some of these projects. Later, in 2009, BRAC expanded beyond Bangladesh to promote the implementation of the evidence-based interventions of the graduation approach in new geographies and reach millions more people via what is now BRAC International. To support further expansion of the graduation approach and reach millions more households across Africa and Asia, BRAC launched the BRAC ultra-poor graduation initiative (UPGI) in 2016, a global programme within BRAC International that works to scale the approach through governments. Through BRAC International and UPGI, BRAC has directly implemented and provided technical assistance on graduation programmes in 17 countries other than Bangladesh, further expanding its reach.

The graduation approach has also been widely adopted and is currently being implemented by more than 100 organisations, including governments and NGOs, in nearly 50 countries. According to data from the World Bank Partnership for Economic Inclusion *State of Economic Inclusion Report 2021*, an estimated 15 governments have adopted the graduation approach across Latin America, Africa and Asia.

Who are the clients?

The UPG programme primarily targets working-age ultra-poor women living on under USD 2.15 per day who are located in hard-to-reach areas and/or in social isolation and have multidimensional vulnerabilities and needs, such as food insecurity, absence of productive assets, lack of access to financial and basic services, being part of women headed families and social ostracism. These criteria are adapted depending on different contexts and needs. The graduation approach is a household-based approach, and eventually the whole

household benefits from the intervention package of the UPG programme in terms of sustainable socioeconomic improvement.

The programme intervenes in different contexts, such as in rural, urban and climate change-affected areas, and targets different populations, such as persons with disabilities and host communities in the refugee context. The subsection of targeted population under each of the interventions varies depending on context and need.

The programme follows a meticulous participant targeting process using national data on poverty and climate vulnerability, and different tools, such as the participatory rural appraisal method and focus group discussions, followed by a detailed questionnaire to capture the socioeconomic information of the potential participants and select them primarily based on the pre-set selection criteria. Following verification by mid-level managers, the final selection is completed. Although the whole process is facilitated by the BRAC team, the community remain engaged in the process during participatory rural appraisal and focus group discussions.

From the participant's point of view, receiving hands-on coaching is mandatory, along with other programme supports.

Every year the UPG programme enrolls around 60 000 participants, where one frontline staff member is responsible for 100 to 120 participants.

Who are the coaches?

Coaches are recruited through the organisation as regular staff (selected on the basis of experience, communication and listening skills, sensitivity and compassion, the ability and willingness to encourage and motivate people living in remote areas, and knowledge on the local market and value chain). Training for coaches consists of interactive lectures and field visits, job shadowing, on-the-job training, mentoring, regular and need-based training, etc.

All frontline staff need to prepare their work plan. The branch team is solely responsible for supporting and supervising frontline staff. In parallel, regional and zonal teams provide support / supervise the branch team. During field visits regional and zonal team members also analyse the participant's current situation along with their progress, identify gaps and provide guidance to the frontline staff to improve the hands-on coaching mechanism. As the programme has become fully digitalised, branch managers are now tracking frontline staff performance using real-time data, and, overall, the monitoring and supervision capacity of the programme has been rapidly enhanced.

The hands-on coaching interventions are prepared through context analysis, capacity building and training on hands-on coaching techniques, information on the topics that are likely to arise during implementation, and developing the clients' follow-up schedule and materials (i.e. flipchart, information book, etc.).

Impact

The programme is rigorously monitored and evaluated using set success indicators (increased assets and diversified livelihood; increased market services and social capital; improved food security and financial services; access to government services; positive behavioural change, etc.). These achievements are measured using a set of economic and social criteria known as graduation indicators.

Every year 98 % to 99 % of participants complete the programme (or 'graduate'). One of the longest rigorous RCTs in the world conducted by the London School of Economics and BRAC University found that, 4 and 7 years after participating in BRAC's UPG programme, participants continue on an upwards trajectory out of poverty. Results showed a 37 % increase in annual earnings, a 10 % increase in consumption spending, a ninefold increase in savings and a twofold increase in access to land, among other outcomes. The evaluation observed that programmes such as UPG are considered to be more cost-effective in the long run, meaning that the benefit is higher than the cost. Nobel Prize laureates Esther Duflo and Abhijit Banerjee led a multicountry evaluation (Banerjee et al., 2015) of graduation programmes across six vastly different countries and found that the graduation approach 'caused broad and lasting economic impacts'. A more

recent study of UPG by the London School of Economics found that extreme poverty persists because people are in a poverty trap – facing extreme conditions in which multiple reinforcing barriers keep people stuck – and that graduation is one of the most effective ‘big push’ approaches to breaking the poverty trap (Balboni et al., 2022).

A further study in Niger (Bossuroy et al., 2022) by the World Bank and Innovations for Poverty Action found psychosocial support in the form of coaching and community engagement to be key to graduation’s cost-effectiveness and programme impact. The study found that even 18 months after interventions concluded, participants who received psychosocial support had higher rates of return than those who received cash.

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<https://www.atd-quartmonde.fr/nos-actions/projets-pilotes/laction-de-promotion-familiale/>

#### What is it? Background and aims

ATD Fourth World (FW) was founded in a large emergency housing camp in Noisy-le-Grand, France. There, in 1957, Joseph Wresinski <sup>(47)</sup> met disenfranchised families who catalysed his personal experience of poverty into a vision for a movement of people overcoming poverty and shaping a society without exclusion. ATD FW considers people in poverty as partners with a unique knowledge and experience that can help break the barriers separating individuals and communities. The challenge is also to enable institutions to understand and take into account the people and families who are the most excluded from access to the country's economic, cultural and social assets. ATD FW has developed a presence around the world through multiple projects co-constructed with people in persistent poverty.

The ATD FW programme known as the 'family development centre' has run since the housing camp in Noisy-le-Grand evolved into a social housing estate (1976). The housing estate includes apartments allocated to ATD FW for a pioneering social and collective action that aims to guarantee families deprived of housing and affected by multidimensional and persistent poverty effective access to fundamental rights. At the family development centre, ATD FW provides housing for families who have been homeless for a significant period of time. Their previous experiences on the streets or in temporary shelters have often involved separation of family members. The project aims to provide them with much-needed stability through accommodation that is guaranteed for a medium-term period (18 months, renewable once) and that will enable them to build their family and social life. While living in the family development centre, they are not only housed but also connected to employment opportunities and creative cultural projects so that they can reconstruct their lives. Each family consults with ATD to develop its own 'overall social action plan'. This can include enrolling young children in a community preschool, an after-school centre for children aged 6 and up, and job search assistance for adults. The goal for each family is to be able to move on to find their own housing within 2 to 4 years.

#### How does it work?

The project has been running since 1976, within the French national framework of the financing of the centres d'hébergement et de réinsertion sociale (CHRS) (housing and social rehabilitation centres).

The centre's admissions team works closely with the SIAO 93 (the departmental referral service for homeless families) and identifies clients through meetings and partnerships with local structures, social workers and organisations working with people in precarious conditions.

The work carried out with the families is the subject of a social assistance agreement and is part of a pilot social integration project made possible by the close partnership between the DRIHL (Direction régionale et interdépartementale de l'hébergement et du logement – a governmental agency for housing), property owners (Emmaus Habitat, Habitat et Humanisme) and ATD FW. DRIHL is the financing partner, and the property-owning organisations accept the housing of families with precarious economic status. ATD FW relies on these partnerships to welcome the families who can thus enter into a process that enables them to assume their family responsibilities (education of children, return to work, social life) and their responsibilities as tenants (payment of rent, insurance, cleaning and maintenance of the dwelling, good neighbourly relations).

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<sup>(47)</sup> <https://www.atd-fourthworld.org/who-we-are/history/joseph-wresinski/>.

Once they arrive in the centre, families are placed in occupancy conditions as close as possible to those of common-law schemes. In this case, common law is defined as all legal rules applicable to all situations that are not subject to special or particular rules. Therefore, although the accommodation provided by the ATD family development centre on the arrival is transitional, families are welcomed as full tenants of their accommodation, signing the contract and paying the rent, with the support of the French housing benefit scheme. The aim is to prepare the families for the standard living conditions of other citizens in order to promote their long-term integration into society.

Other levels of support include the following.

- Families are encouraged to be actors in their own project from its development to its completion. When they arrive at the family development centre, each family has more or less an idea of their project, but often they have neither formalised it nor planned it in a time frame. Once they have settled into their accommodation, they gradually express their aspirations and priorities, which is the first step towards developing a family project.
- Throughout their stay, the families are accompanied and supported in the formalisation and realisation of their project. Each family meets with the management, the social team and some members of the team related to the framework of the family project. They meet within 6 months of their arrival, and then twice a year. The team's objective is to create, together with the family, the conditions necessary for the emergence of such a project and its implementation.
- The family and the team draw up a series of reciprocal commitments intended to support the family's project and the responsibilities that arise from it. These actions mainly concern support for parenthood, the acquisition of a 'housing culture' (rights and duties of the tenant) and gradually gaining control over their life.
- At the end of each family project meeting, the family is given a report (following the FALC method – 'Facile à lire et à comprendre' – with use of logotypes and pictograms). The report is created in real time, which makes it possible to read/decode it at the end of the meeting, to correct it immediately if necessary and to have it signed off by the family. This document serves as a reference for the next meeting.

Meanwhile, the centre's collective socioeducational and cultural programme targets the harmonious well-being of adults and children living there as well and their interactions with the neighbourhood community.

The specific actions of the centre are as follows.

- An early-childhood programme in the form of parent-children sessions for the development of children under 3 years of age and for parents to gain confidence in their parental role; and a 3- to 6-year workshop supporting school integration, co-facilitated with the Montessori France Association and the Maria Montessori Institute.
- Children and youth educational and cultural activities, where participants can develop their understanding of the world and discover their potential, limits and aspirations through reading activities, manual and artistic workshops, meetings, outings, games and sports activities. Support is offered to help them develop their own projects that lead towards autonomy and emancipation. These actions, whether individual or collective, give the children and young people confidence in their capacity to learn.
- Adults are supported to join ATD programmes promoting civic action, such as the Fourth World People's University, which is a forum where people from different social backgrounds can come together to discuss and share ideas. The basis of this encounter is the recognition that the knowledge and experience of people living in poverty has value. This type of forum creates a space where people freely express themselves, giving birth to new ideas, projects and proposals.
- Throughout the years, other one-off programmes, in partnership with various organisations, complete this set of actions, such as family vacation stays, festival of learning campaigns and youth camps.

After the stay in the centre, which can vary from a few months to 4 years, each family must be rehoused. During the 2 years following the rehousing, the centre's social team and family promotion team continue their work with them, to support their integration into the new environment. Indeed, the rehousing stage is not necessarily a sign that families involved in the project have resolved all their difficulties. The aim is therefore to support the establishment of links between the rehoused family and new partners who will take over the support work if necessary. The centre's team observes the principle of 'non-abandonment' of the families:

even years after rehousing, it looks for possible support for families who come back to it. The on-site capacity is 35 families and 15 families are followed up at distance.

Where is it applied? By whom?

This programme has been run by ATD FW together with partners (DRIHL, Emmaus Habitat and Habitat et Humanisme) for more than 40 years, and the work is concentrated mainly in Noisy-le-Grand in the east of the Paris area. However, part of the programme covers other regions all over France, as support continues during 2 years after the rehousing of the families, wherever they go.

Who are the clients?

Admission criteria for families include:

- homelessness;
- at least one parent, and one child under the age of 3 years;
- at least one parent legally documented (with regard to permission to stay in France);
- income below the social minimum.

Second-level criteria include:

- need for parenting support (judicial measure, placement in care, etc.) with young children;
- complicated backstories;
- multiple fragilities;
- distrust of institutions, social services, etc.

Who are the coaches?

The centre's team is made up of people with different functions, training and status: social workers, young children's educators, social and family economy advisors, sociocultural facilitators, administrative staff, directors, etc. They are trainees, social workers, salaried employees, ATD full-time volunteers (ATD permanent workers who are committed to working full time and in the long term alongside people in persistent poverty) or part-time volunteer members of the ATD Fourth World Movement.

A specific facet of the programme is the presence in the neighbourhood of people who have chosen to be neighbours of families in great difficulty. These are ATD full-time volunteers or other committed citizens. These 'core-neighbours' (*'voisins solidaires'*) are concerned with helping the most vulnerable families feel recognised by the community and ensuring that the links with their environment are as harmonious as possible. They are trained and monitored in this mission by ATD Fourth World.

Impact

All families at the centre are rehoused when they leave the centre.

As a pilot project, the centre's aim has been to inform social policy, to advance understanding of the situations experienced by people living in persistent poverty and chronic homelessness, and to learn from how people in poverty themselves understand and overcome their difficulties. The project promotes the participation of formerly homeless individuals in seminars, with participants including public authorities, landlords, housing associations, and other teams and projects of ATD Fourth World.

Over the years, thousands of people from all over the world have visited the centre and have met both the inhabitants and the teams working there.

The project has been able to demonstrate the truth behind its fundamental principles.

- The importance of a global approach, because the lives of the families involved form an indivisible whole in which interconnected choices are made. School, culture, housing, health and friends are not disjointed facets but components of a whole life.
- The importance of working 'with' families and not 'for' them. The project rejects a model based on 'assistance'.

These ideas were innovative in 1957, but they have gained ground. Most large organisations working in this area are committed to involving their beneficiaries in their actions.

In the same way, ATD Fourth World's practice of 'accommodation in real housing' is now present in almost half of the French CHRS.

However, the French administrative landscape remains fragmented, with childhood considered one sector, health another, housing a third, culture a fourth, etc., which means there is still a long way to go in promoting a multidimensional approach to family development.

Finally, the ATD Family Development Centre in Noisy-le-Grand gave birth to the pilot company Travailler et Apprendre Ensemble (TAE), which promotes a multidimensional approach based on employment. (The employees have a permanent contract of employment, they support and train each other and they take part in all levels of decision-making and work organisation. For the past 10 years, with annual variations, this company has managed to balance its accounts without being labelled a social integration enterprise and while remaining faithful to its primary mission of offering jobs to people whose employment pathway has been strewn with failure.

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## What is it? Background and aims

Economic Mobility Pathways (EMPath) is a Boston-based non-profit organisation working for the disruption of poverty. It developed a science-based coaching approach, founded on the belief that each pathway out of poverty is different. It aims to build human development and to create lasting pathways to economic mobility for all.

Coaching for people in poverty is based on an approach (mobility mentoring) aimed at creating full economic independence and improving decision-making skills, which together can sustain an exit from poverty.

## How does it work?

The methodology is clearly codified. It was developed and has evolved in collaboration with a variety of partners, including the Harvard Center on the Developing Child, Ideas42 and the Helen Wills Neuroscience Institute at the University of California, Berkeley.

In the Bridge to Self-Sufficiency framework, clients set their own individual goals for personal development. Such client-driven goal setting is a key, non-negotiable element of the framework.

The client is coached to acquire and improve real-world gains in five key areas: family stability (including housing, childcare and food security); well-being (including mental and physical health and social networks of support); financial management (including debt reduction and asset building); education and training; and employment and career.

At the same time, the second aim of the framework is to create improvements in the decision-making skills necessary to consistently and successfully set and achieve personal goals. These skills include personal agency and growth mindset, problem-solving and strategic thinking, and behaviour management and self-regulation. These skills are sometimes referred to as executive function skills.

As a multidimensional/holistic framework, it requires professionals to set goals across the five specified areas of the framework.

The average duration varies depending on the programme context of implementation. When implemented properly, it is recommended to last 3 to 5 years.

Costs vary depending on the programme context of implementation. Frequency and duration of coaching vary across these contexts, and therefore so do costs. For example, implementing mobility mentoring into existing child service programmes costs little more than training costs per staff member (perhaps USD 1 000/staff member). However, when implemented as a new stand-alone programme and with high programme standards of service delivery, the cost can be USD 4 000 per person per year.

## Where and who applies it?

Mobility mentoring coaching, initially implemented by EMPATH in Boston, Massachusetts, has now expanded through partnerships with many organisations both in the United States and internationally (Australia, the Netherlands and the United Kingdom). The programme developed a series of guidelines, manuals, etc., to ensure that it may be entirely transferable. So far, it has been used by hundreds of organisations, with over 350 000 clients to date (since 2014).

Mobility mentoring has been incorporated into many public services, including housing, health, childcare, employment and education. As of 2021, the network was supporting more than 50 000 persons per year.

In this context, coaching is delivered by both NGOs and public/government programmes and services.

Partner organisations may adapt the approach and tools to their specific contexts; however, to ensure a robust evidence base they should follow guidelines and track data on how the tools and approaches have been adapted and their outcomes.

Programme contexts include public housing and shelter, early childhood and day care, healthcare, financial empowerment, education, job training and job readiness, community development and municipal services programmes.

Who are the clients/target groups?

The programmes target adults and families who have a very low income (typically less than 30 % of the median wage). Target populations also include persons who are heavily dependent on public subsidies and may face numerous barriers to employment (e.g. language barriers, history of trauma or lack of legal residency). Participation in mobility mentoring is primarily voluntary but also can be embedded in conditional support programmes.

Clients may be both individuals and families. The target age is those who are work-ready (typically 18–65 years) and their families, but mobility mentoring approaches have been used with people of all ages, from pre-school children all the way to adults in their 70s.

Mobility mentoring interventions are most commonly delivered in developed countries in both urban and rural areas; however, principles of mobility mentoring are also being used in low-income countries and in conflict zones.

Who are the coaches?

Coaches are most commonly selected through a competitive application process in which they see the job description for a mobility mentor, apply, are examined for their written and oral communications skills and work history, and are then interviewed for their relevant personal skills and experience.

They are trained through an online training course supplemented by personal coaching and ongoing supervision by trained supervisors. Supervisor training is also provided online and with personal supervision.

Coaches typically have prior experience working in social welfare programmes. It is recommended that they are educated to at least the level that they will be coaching clients to attain, or higher. It is recommended that coaches have similar language, race and culture to those they will be coaching. It is also recommended that coaches have personal characteristics such as a growth mindset, and high expectations/personal regard for those whom they will coach.

Impact

The programme includes a rigorous impact evaluation methodology. This shows that on average participation in the programme led to a 168 % increase in annual earnings to more than USD 48 576 per year; a 94 % increase in college completion; and average personal savings of USD 3 500 (average outcomes of high-standard flagship programmes with 3- to 5-year participation ending in the 2021 financial year).

The primary success indicator is gains in earned income, with a target of the median wage. However, the organisation also measures gains/losses in family stability, well-being, asset gains and debt reduction, education and training, and employment. Research has shown that the bridge to self-sufficiency (the scored core framework for assessment and goal setting) has very high predictive value for economic mobility and future earnings.

The 2022 outcomes (EMPath, 2022a) include data on three groups: all EMPath participants (all those directly served by EMPath itself, including participants served for 1 year or less and those who are homeless), EMPath flagship programme participants (a subset of all participants that includes only those served in 3- to 5-year programmes of coaching) and, finally, the Economic Mobility Exchange ('the Exchange') network of 175 partner organisations currently learning from and using EMPath tools and processes. The results for 2022 indicate, for instance, that 72 % of participants in the flagship programme exited it with a college degree (up from 34 % at entry); the employment rate of participants increased from 38 % to 45 %; and that, in spite of

the challenging year, participants were able to substantially increase their savings. Further information on outcomes may be found in the 2022 annual reports of EMPATH (EMPATH, 2022b) and the Exchange network (EMPATH, 2022c).

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**EMPath**  
Economic Mobility Pathways

# BRIDGE TO SELF-SUFFICIENCY®

FAMILY STABILITY		WELL-BEING		FINANCIAL MANAGEMENT		EDUCATION & TRAINING	EMPLOYMENT & CAREER
Housing	Family	Physical & Mental Health	Networks	Debts	Savings	Educational Attainment	Earnings Levels*
No subsidy, housing costs 1/3 or less of household gross pay	Fully able to engage in work, school, and family life; children or family needs don't get in the way (OR) No children or dependent family members	Fully able to engage in work, school, and family life; health and mental health needs don't get in the way	Can always rely on networks to provide useful advice, guidance, and support; advocates for others	No debt other than mortgage, education, and/or car loans, and current in all debts	Savings of 3 months' expenses or more	Bachelor's degree or higher complete	Earnings ≥ 80%+ AMI (Family-Sustaining Wage) Household Size of: 2: ≥ \$72,550 3: ≥ \$81,600 4: ≥ \$90,650
No subsidy, housing costs exceed 1/3 household gross pay	Mostly able to engage in work, school, and family life; children or family needs rarely get in the way	Mostly able to engage in work, school, and family life; health or mental health needs rarely get in the way	Can often rely on networks to provide useful advice, guidance, and support	Current in all debts and making more than minimum payments on one or more debts	Savings of more than 2 months' expenses, but less than 3 months' expenses	Associate's degree or professional certification complete	Earnings = 50% - 79% AMI Household Size of: 2: \$51,200 - \$72,549 3: \$57,600 - \$81,599 4: \$63,950 - \$90,649
Subsidized Housing - pays \$300+ towards rent	Somewhat able to engage in work, school, and family life because of children or family needs	Somewhat able to engage in work, school, and family life because of health or mental health needs	Can sometimes rely on networks to provide useful advice, guidance, and support	Making minimum payments on all debts	Savings of at least one month's and up to 2 months' expenses	Job training or certificate complete (beyond high school)	Earnings = 30% - 49% AMI Household Size of: 2: \$30,700 - \$51,199 3: \$34,550 - \$57,599 4: \$38,350 - \$63,949
Subsidized Housing - pays \$0 - \$299 towards rent	Barrelly able to engage in work, school, and family life because of children or family needs	Barrelly able to engage in work, school, and family life because of health or mental health needs	Can rarely rely on networks to provide useful advice, guidance, and support	Behind in payments of 1 or more debts and making payments on at least 1 debt	Savings of less than one month's expenses	High School Diploma or GED/HSET complete	Earnings < 30% AMI Household Size of: 2: < \$30,700 3: < \$34,550 4: < \$38,350
Not permanently housed	Not able to engage in work, school, and family life because of children or family needs	Not able to engage in work, school, and family life because of health or mental health needs	Can never rely on networks to provide useful advice, guidance, and support	Has debts; currently not making any payments	No savings	Less than High School Diploma or GED/HSET	Not currently employed

THINKING ABOUT THE FUTURE

MAKING DECISIONS IN CONTEXT

For more information, please visit [www.empathways.org](http://www.empathways.org).

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\*Income ranges are for Suffolk County, MA. Data from HUD's 7/1/20 AMI tables



## Hela familjen Malmö

<https://malmo.se>



### What is it? Background and aims

Hela familjen ('the entire family') is a programme within Malmö municipal social services in the Department of Housing and Income Support. It is organised into five teams, covering the five city areas Malmö Social Services has responsibility for.

The method was developed locally, building on experience from a pilot project.

### How does it work?

The main focus of the coaching is building strong relationships, through multiple sessions on a regular basis, in addition to having a clear focus on the children and their well-being. Another focus is identifying needs and then motivating the families to take the necessary steps to overcome their issues.

The work is tailored to individual families but consists of certain processes:

- exploration of various life areas;
- setting clear goals;
- budget counselling;
- collaboration with the family's professional network – school staff, healthcare practitioners, career coaches and social workers specialising in, for example, family counselling.

The focus is on the parent–child relationship and the child's well-being, but also on the adult and their progress in relation to financial self-sufficiency, health, education and employment.

The philosophy is to look at 'whatever it takes' to support people in poverty towards economic mobility and autonomy.

The approach is individualised and tailored to the specific needs of clients, but with some standardised processes:

- exploration of life areas and what impact they have on future employment:
  - social situation – housing, home situation, social network, physical health, mental health, addictions, debts, domestic violence, criminality and connected risks, the individual situation of each child,
  - goal and employment – employment history, education, job search activities, expectations;
- regular contact with the families;
- collaboration with the family's professional network;
- visit in the home environment at the start of programme participation.

Home visits and part of the exploratory interview are not carried out in cases where the referring social worker has performed one or two of these recently, unless it is deemed necessary in order to build a relationship with a family that is socially inaccessible.

Every social worker is responsible for a caseload of 30 families, and when a case is closed they take on a new case from the waiting list. In total, hela familjen works with approximately 600 families per year.

The average duration of participation in coaching is from 6 months to 1 year.

Regarding costs, if a family is in the programme for a whole year the cost would be approximately EUR 14 000, not including rest and other overhead costs.

Where is it applied? By whom?

The programme offers services to all families who receive income support within the city of Malmö, no matter which neighbourhood they live in.

Who are the clients?

Hela familjen works solely with families (mostly single-parent families).

It works with low-income families with long-term need for income support and with an additional need for close social support and collaboration with, for example, schools and healthcare and treatment services. Recently, hela familjen has also started to offer the programme to families who have a shorter history of receiving income support but have issues that put them at increased risk of long-term financial insufficiency. This could be, for example, social or mental issues, language difficulties, debts, multiple children or low education – often a combination.

The parents are aged 19–64 years; however, the bulk of clients are aged under 40 years.

Clients are referred to the programme by other social workers in the department.

Who are the coaches?

Coaches are part of the regular municipal social services and have access to family treatment and some employment services from within the department. However, in the case of, for example, subsidised job placement or healthcare, we collaborate with municipal, provincial or federal services such as the Swedish Labour Market Board or the Swedish general healthcare system.

The coaches are social workers, initially hired to work with income support. New team members are chosen based on interest and personal qualities, through interviews with the manager and the team members. The team members have a major role in deciding who will be selected, since they often work together on cases.

The coaches are trained when they are hired as social workers and do not receive any specific training after having been selected for the hela familjen team. However, it has developed a method for city-wide peer training, supported and sometimes planned by the managers. In these workshops, organised four times per year, it works with theme-based case studies and continuous learning. It has worked on topics such as gender equality, effective motivational sessions, children's rights and methods to measure success.

Coaches should be eager to get results, flexible, have great social skills and be patient.

Impact

About 25 % of all families become financially self-sufficient every year. On top of that there is an additional 25 % who become partially self-sufficient. This is when the parent starts an education course or a job, but the income is not enough to support the family, and therefore needs complementary income support. However, in many of the latter cases, the family will become self-sufficient later.

The success indicators are total or partial financial self-sufficiency through work, studies or permanent sick pay.

However, hela familjen is at the moment developing a method for measuring social improvement, where it will measure, for example, participating in a labour market programme, signing up the children for day care, receiving medical treatment or treatment for substance abuse, or other actions that are deemed helpful in reaching their goal in the short or long term.

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## Hesed Model for integrated development

<https://www.hesed.bg>



### What is it? Background and aims

The Hesed model for integrated development (MID) is a multidimensional programme designed for community development, with the primary goal of breaking the cycle of poverty. Established in 2002, the programme is currently implemented in four community-based centres in Bulgaria, supported by EU funds, prominent international NGOs and the US National Institutes of Health. Some components of the programme were developed through international collaboration <sup>(48)</sup>.

The programme aims to foster personal and community growth and bring about a transformation in community norms by creating new role models who inspire others to share the same values and strive for a better life.

The theoretical foundation of the programme is based on Erikson's stages of psychosocial development theory (1950), which explores the impact of social experiences throughout a person's lifespan. According to this theory, personality develops in a series of stages, with each stage building upon the previous ones and laying the groundwork for subsequent periods of development. Each stage presents individuals with a conflict that serves as a pivotal point in their development. These conflicts revolve around the development or failure to develop specific psychological qualities. During these critical periods, individuals have great potential for personal growth, but also face the risk of failure. Successfully navigating these conflicts allows individuals to emerge from each stage with psychological strengths that will benefit them throughout their lives. Failure to effectively resolve these conflicts may result in the inability to develop essential skills for a strong sense of self, hindering success in social interactions.

Based on this theoretical framework, the intervention focuses on two crucial periods in life development.

1. Early childhood (0–5 years), as a fundamental stage for the development of cognitive skills, emotional intelligence and the establishment of basic trust. To facilitate positive and sustainable personal development, the programme emphasises interventions within the immediate social environment, such as the family and friends circle.
2. Adolescence (12–17 years), as a formative period for socialisation, value formation, identity development and the cultivation of self-esteem for adulthood. The programme employs coaching techniques to enhance social skills, including building self-esteem, fostering an adequate self-image, and assists young individuals in developing realistic life plans, professional orientations and responsible behaviour.

### How does it work?

The programme employs intensive professional and specialised services to empower children aged 0–5 years and their parents from pregnancy onwards, and also adolescents, by equipping them with the necessary life and social skills to prepare for the labour market.

The MID approach is comprehensive, integrating key dimensions of education, employment and health. Its methodology encompasses a diverse range of activities aimed at building the capacity, confidence, capability and socioeconomic resilience of programme participants.

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<sup>(48)</sup> Exchanges of good practices with partner organisations such as Barnardos (Ireland), Terre des hommes (Switzerland) and the Center for AIDS Intervention Research (Medical University of Wisconsin, Milwaukee, USA).

Coaching is provided by a multidisciplinary and multi-ethnic team consisting of psychologists, social workers, health professionals and specially trained paraprofessionals from the same community. It combines structured and time-bound group sessions, psychodynamic training, home visits and individual consultations. While the methodology primarily relies on dynamic training and group work, individual case management is also utilised, albeit less frequently. The specific approach employed is determined by the unique needs and beliefs of the target group.

The programme focuses on enhancing clients' decision-making skills, confidence and future planning abilities, and raising awareness of pertinent health and social issues, such as family planning, immunisations, nutrition, domestic violence and early marriages. It also emphasises emotional responsiveness to children's needs, improving the quality of care and reducing risk factors for health and development.

In addition to specialist professionals, the programme engages paraprofessionals from the community who act as mediators, providing support to families to ensure children attend school and kindergarten, facilitating communication with teachers and institutions and acting as intermediaries with healthcare services. Coaches also provide training and guidance on household cleanliness, ensuring a safe environment, establishing access to clean water and sanitation facilities, home energy efficiency and basic financial literacy. In collaboration with Habitat for Humanity (Bulgaria), the programme offers small interest-free loans to improve housing conditions. A key principle of the programme is its strong connection with mainstream services, ensuring the long-term sustainability of the intervention.

The programme also provides direct services to children, including an alternative kindergarten for those not covered by the educational system. This initiative aims to enhance the school readiness of 3- to 5-year-old children. For other children involved in the programme, various activities are provided to improve their cognitive development, play abilities and psycho-motor skills.

The duration of the programme varies depending on the specific context, ranging from 6 months to 5 years. The cost is approximately EUR 900 per family per year.

Who are the clients?

The programme is designed to support families, their children and young individuals (adolescents). It primarily works with children and families living in segregated urban areas, predominantly inhabited by Roma communities in Sofia (Fakulteta and Filipovtsi neighbourhoods) and Kyustendil (Iztok district). These communities face isolation and harsh living conditions, including inadequate access to sewerage and running water, poor infrastructure, high rates of illegal housing and overpopulation. Most families struggle with unstable incomes and face difficulties in covering daily expenses. Furthermore, they lack health insurance, limiting their access to healthcare services.

While a small percentage of clients are referred by the Child Protection Agency, the majority enrol voluntarily based on the recommendations of mediators within the Roma community. The programme currently serves approximately 800 families per year across the four locations, subject to available funding.

Who are the coaches?

The programme is delivered in community-based centres by an NGO. The coaches consist of specialists such as psychologists and social workers, as well as paraprofessionals who are specially trained co-workers from the Roma community. Frontline staff are required to possess qualities such as openness, strong communication skills, knowledge of the local culture and context (proficiency in the Roma language is an asset), empathy, flexibility, cultural tolerance and the potential to be role models in the community.

Quality assurance, methodology development, and improvement are ensured by expert staff at Hesus headquarters. They provide induction training to field staff, support training efforts and conduct regular supervision of implemented programmes. The programme maintains close connections with local services, including child protection departments, social welfare services, employment services, medical care services, educational services and school authorities.

Impact

The programme evaluates its impact based on expected intermediate and final outcomes. For children, the anticipated outcomes include increased safety, greater active participation by families in the child development process, prevention of placement outside the family, improved nutrition, including home-cooked food, and enhanced psychosocial and cognitive skills. For parents, the expected outcomes include positive exercise of their parental roles and responsibilities, learning how to adequately respond to their children's

physical, psychological and educational developmental needs, and improved psychological readiness and responsiveness to their children's needs.

For young adults, the programme aims to enhance life and social skills, such as decision-making, self-confidence, critical thinking, prioritisation and future planning. It also aims to decrease risk behaviours and raise awareness on health-related issues, such as family planning, drug prevention, sexual health and social development, including active citizenship and postponement of early marriages.

Expert evaluations of the parental skills programme (Toneva-Metodieva, 2016) have shown that MID increases protective factors and decreases risk factors for the majority of participating families. Significant improvements have been observed in parental responses to children's needs, including increased time dedicated to playing with children, increased knowledge of children's needs, reduced screen time, improved quality of care and healthier nutritional habits.

Here are the specific impacts mentioned.

1. Employment status. 40 % of the families involved in the programme have experienced an increase in their employment status.
2. Loan repayment. Among the families who have used interest-free loans provided by the programme for improving housing conditions, 80 % have been able to pay back the loan.
3. Life and social skills for young adolescents. The life and social skills programme for young adolescents has resulted in a 10 % to 30 % change in attitudes and lower rates of risky behaviour.
4. Impact of alternative kindergarten. Evaluations of the impact of the alternative kindergarten provided by the programme have shown very good results in terms of school readiness for 3 to 5-year-old children. The developmental assessments (DAYC) and state educational requirements (SER) indicate that, although children enter the programme with significantly lower achievements compared with their peers, by the time they complete the programme their achievements are comparable to those of their peers in the general population.

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P.I.P.P.I.



<https://pippi.unipd.it/>

What is it? Background and aims

The national programme of intervention for prevention of institutionalisation (P.I.P.P.I.) is the result of an innovative public collaboration between the Ministry of Labour and Social Policies and the University of Padua. The programme is co-managed by the university, the Ministry, and regional administrations. It represents the application of national legislation and EU guidelines that point to parenting support as essential to 'break the cycle of social disadvantage' (REC 2013/112/EU).

P.I.P.P.I. is aimed at fostering positive parenting and the well-rounded development of children aged 0–11 years living in neglectful conditions and poor families. Its name is inspired by the fictional character Pippi Longstocking, a symbol of child resilience.

In 2019, Italy implemented a new minimum income and social assistance scheme (reddito di cittadinanza (RdC)). In this context, low-income <sup>(49)</sup> families with children in a vulnerable situation are entitled to receive sustained support by subscribing to a social inclusion pact (PaIS). The aim is to integrate a policy against poverty with a policy of parental support through the methodology of transformative assessment and planning. Families in poverty receive financial support, but also tools and accompaniment towards empowerment, to break the poverty cycle.

A total of 40 % of families participating in P.I.P.P.I. are also beneficiaries of the RdC. A new law (December 2021) has identified P.I.P.P.I. as a service to be guaranteed to all beneficiaries who qualify (essential level of social support; livello essenziale delle prestazioni sociali). Therefore, since mid 2022 the service has been implemented in all Italian municipalities, using EU funds (NextGenerationEU).

The methodology was developed by the University of Padua through a participatory implementation process with social services, starting in 2011. It is a collaborative and intersectoral intervention approach co-developed with a large number of partners and professionals. Its conception builds on the framework for the assessment of children in need and their families (FACNF) developed by the United Kingdom's Department of Health in 2000 (DoH, 2000). It is based on the ecological theory of human development of Bronfenbrenner (1979, 2005) and enriched with a focus on participatory and transformative approach (Lacharité, 2009, 2011; Léveillé, Chamberland, 2010; Milani et al., 2020).

Since 2011, the programme has supported over 5 000 families and it has involved 20 000 professionals in 250 municipalities.

How does it work?

The intervention aims to:

- help parents reflect on their responses to children's developmental needs (children needs);
- provide full support to the children's developmental needs by improving parenting skills;
- improve the organisation of the children's life and the quality of their environment (environmental factors).

The methodology is based on a standardised model, which is then tailored to the specific situation of each family to help them design a personalised project. Families are supported by a multidisciplinary team (at least

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<sup>(49)</sup> Family income below EUR 9 000 per year.

a social worker, educator and psychologist, and the child's teacher), who helps analyse their situation and draw up a plan that responds to their specific needs and resources.

The process entitles every family to the following.

- An assessment process. All family members (parents and children at least), with the support of the professional team, go through an assessment process to better understand their situation.
- A project plan process. The assessment process is oriented to build a change co-decided and co-designed with the entire family. The plan is multidisciplinary and it is drawn up with the entire family and all the team around the child.
- An implementation process strictly connected with the project plan.

The implementation consists of homecare intervention in which practitioners meet with the families approximately twice a week for a minimum of at least 4 hours a week; regular meetings involving parents in group activities with other parents, to improve parental skills such as decision-making, problem-solving and organisation of daily life; the intervention of family helpers who offer support in concrete aspects of daily life; and cooperation between early childhood education and care / schools / families and social services.

The child's school (kindergarten, nursery or primary school) is invited to be a full member of the multidisciplinary team working with the family and to be responsible for its own intervention.

The interventions last 18 months, and the budget is EUR 5 000 per family.

Where is it applied? By whom?

The programme is now applied across the whole of Italy. It is coordinated by the Ministry of Labour and Social Welfare, who provide financial and management support, and technical and scientific support is provided by the University of Padua.

Who are the clients?

The programme is targeted at families with children aged 0 to 11 years. 20 % of the participating families may have children aged 12 to 16 years.

The participating families are referred by the school or social services. Participation in coaching is purely voluntary, but since 2019 every family, especially if with children aged 0–3 years, in a situation of particular economic vulnerability is entitled to enter the programme.

Who are the coaches?

The multidisciplinary teams working with families are composed mainly of professionals working in public social services, who join the programme voluntarily. They receive week-long training in person and 2 days of asynchronous digital learning activities.

In each municipality participating in the programme, two coaches perform a coaching function for the multidisciplinary teams. These second-level coaches can be a manager, head of an operational unit or a professional. They must have institutional legitimacy and the necessary time (on average 2 to 3 days per month). They accompany the teams in the implementation of the programme (choice of families, preliminary assessment, tutoring, use of tools, verification of the compilations and progress of the projects of each family and of the devices used, etc.).

The University of Padua research team provides coaching and mentoring to the second-level coaches in dedicated meetings taking place every 3 to 4 months.

Impact

Results are monitored through the platform RPMonline, which detects ('rilevare'), plans ('progettare') and monitors ('monitorare') all the objectives and actions carried out in relation to the family system, the social network, the school attended by the children and young people, the environment in general and the needs of each family member.

The programme carefully monitors impact, based on the identification of final, intermediate and proximal outcomes. Expected final outcomes for children are ensuring the children's safety, encouraging their development through participation in their project, preventing placement outside the family and improving children's psychosocial and cognitive skills.

Expected intermediate outcomes for parents are enabling parents to positively exercise their parental role and responsibilities, enabling parents to learn how to construct adequate responses to their children's physical, psychological and educational developmental needs, and improving the psychological readiness of parental figures and behaviour responsiveness to children's needs.

Expected proximal outcomes for services are encouraging parental participation and collaboration through the caregiving process, especially in decisions affecting the family; parents having the support they need to exercise their responsibility for their children (sufficiently intense, consistent and continuous); and promoting a climate of collaboration between all the professionals involved in the project and all the adults who make up the children's care network to enable real integration of the interventions.

The evaluation shows that between the start and the end of the intervention (18 months), protective factors increase and risk factors decrease for 90 % of the families involved, and parental responses to children's needs improve in a statistically significant way. The objectives that have been designed are achieved by 80 % of clients. Families are present at 80 % of the meetings where the objectives of their plan are discussed.

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Poverty  
Fundación Paraguaya

<http://www.fundacionparaguaya.org.py>

<https://www.povertystoplight.org/>

Stoplight



## What is it? Background and aims

Poverty Stoplight is an integrated framework that entails both a multidimensional poverty measurement tool and a mentoring approach. It can be used as a comprehensive stand-alone programme or be embedded into some other programme/project, and it is purposefully adapted to each new context.

The final objective of mentoring is the elimination of multidimensional poverty, which, in the programme theory of change, is defined as the capability and real opportunity to be and do what one values (based on the capabilities approach). This is to be achieved by enhancing clients' critical and collective agency (and also, at the level of the implementing organisation, by working towards systems change).

Critical agency is here defined as having the capacity to make decisions to reach one's objectives based on critical reflections on one's situation and the opportunities one has to change it.

Collective agency is when a group recognises the opportunities they have to change their situation and act together to achieve their common goals.

The guiding principles for Poverty Stoplight mentoring were developed by Fundación Paraguaya based on some theoretic considerations and its experiences implementing the programme in a range of contexts – in particular its decades-long experience in supporting and mentoring microfinance clients.

The following theories in particular underpin the Poverty Stoplight mentoring approach.

- Integral theory (Ken Wilber). Client and mentor together explore potential causes for deprivations that a client experiences using the four quadrants of the integral theory. The key idea is that any given deprivation can have many different causes, including causes related to intentions, behaviours, culture or systems.
- Theory of positive influence (Joseph Grenny and others), based on Albert Bandura's theory of self-efficacy. Subsequently, mentor and client try to identify sources of positive influence that can be leveraged to induce a behavioural change that can respond to one of the identified causes. There are six sources that are related to Bandura's two core drivers for behavioural change (answering affirmatively to the two questions 'Is it worth it?' (motivation) and 'Can I do it?' (skills)), each of them with support at the personal, group and structural level. Note that in the Poverty Stoplight framework, even causes that are not per se behavioural in nature are seen to be influenceable by specific behaviours – for instance, the (structural) lack of an access road can be approached by the behaviour of petitioning local politicians or local organising.
- Concientisation (Paulo Freire). The Poverty Stoplight mentor works with the clients on developing a critical understanding and awareness of their position in social, political, economic, cultural and historical contexts. This is the basis for understanding that improvements are possible and for constructing a vision for a life out of poverty.

## How does it work?

The coaching process is supported by a self-evaluation survey, where clients select their level of poverty (red for extreme poverty, yellow for poverty, green for no poverty) across a number of indicators (typically 50 indicators, although the number varies across adaptations). Upon completing the survey, the mentor guides the client through the 'life map', where points of strengths and areas for improvement are identified. The

client chooses some indicators as priority areas for improvement and, together with the mentor, works on strategies to set specific goals and design a plan to achieve them. Follow-up mentoring sessions are used to check on (and celebrate) progress, make changes as necessary or brainstorm alternative strategies.

Mentoring enhances critical and collective agency by supporting clients to:

- understand their needs and opportunities as they relate to the causes, effects and characteristics of poverty in their specific context;
- aspire towards achieving a better state of well-being;
- commit to engage in specific activities that address the identified deprivations;
- act to address the identified deprivations;
- share their experiences with their peers to promote learning for further understanding, aspiration, engagement and action.

The methodology for mentoring varies depending on the adaptation of the tool. However, the common guiding principle of the methodology is that it is in its core and conviction multidimensional, proposing that deprivations are interlinked and have to be understood and addressed in a connected way. It looks at six dimensions of well-being: income and employment, health and environment, education and culture, housing and infrastructure, organisation and participation, and motivation and interiority. In some adaptations, additional dimensions may be added or changed, but all adaptations necessarily have a multidimensional perspective on well-being. The mentoring relationship is tailored to the individual needs and process of each client/family.

Transferability/adaptability to other contexts is a central characteristic of the Poverty Stoplight framework. The wide range of existing adaptations shows the flexibility of the framework.

The Poverty Stoplight framework includes six main activities, each with some key features:

1. adaptation of the tool, with the following key features:
  - a. ensure the implementing organisation's understanding of the context,
  - b. make mutual goals and values explicit,
  - c. ensure the representation of clients in the process;
2. Poverty Stoplight survey, with the following key features:
  - a. it is a self-evaluation survey,
  - b. indicators have specific characteristics (for instance, they are easy to understand, actionable and achievable),
  - c. the survey uses technology,
  - d. clients provide their voluntary consent;
3. life map, with the following key features:
  - a. clients are guided to understand their situation,
  - b. clients are guided to understand that opportunities for change exist,
  - c. clients discuss and register their priorities,
  - d. clients commit to a level of involvement;
4. high-level analysis, with the following key features:
  - a. the implementing organisation makes use of the data for at least one of the following purposes – describing poverty; understanding changes in well-being; sharing with others to engage them and help them learn; influencing and designing specific solution strategies;
5. proposals for change, with the following key features:
  - a. the organisation implements activities that respond to the identified deprivations and link to at least one of the following results and at least one of the following outcomes:

- i. results – understand, aspire, engage, act, share,
  - ii. outcomes – increase clients’ critical agency, increase clients’ collective agency, promote systems change;
6. global network, with the following key features:
- a. collaboration in solutions database,
  - b. participation in best practice exchange and learning,
  - c. fostering of partnerships between organisations.

Programme duration varies widely, from a few months to several years. In general, in order to allow for sufficient time to see changes in indicators that require deeper level changes, the recommended programme duration is at least 1 year or, even better, a continuous engagement with clients over several years.

Where is it applied? By whom?

The programme was developed in Paraguay where it still is headquartered. It is currently used by over 420 organisations in 47 countries, some of them low/middle income (e.g. Paraguay, Sierra Leone, South Africa), and some of them high income (e.g. Portugal, United Kingdom, United States).

Each adaptation of the tool takes account of the specificity of the local context, both with regard to the well-being indicators used and how the coaching is implemented. This adaptation follows a participatory process involving the community and the implementing organisation. The extent and intensity of coaching attached to the assessment tool varies widely among adaptations.

Local partners often work with a network of organisations themselves, and Fundación Paraguaya does not have an estimate of the number of clients served by the programme so far. However, the main Poverty Stoplight survey platform shows that as of August 2022, around 220 000 surveys had been taken worldwide.

Costs depend strongly on the specific programme set-up and local costs. For instance, the Cerrito programme in Paraguay generally budgets USD 95 per client per year, which covers the mentoring costs per family but does not include the transfer of any resources to the families (the main basis of this programme is the generation of strategic alliances with other actors in society who participate by connecting their social services with the needs of families). The most important cost factor is the mentors’ time, hence programme costs depend first and foremost on the cost of labour in a given setting.

Who are the clients?

The tool is used in a large variety of contexts, but generally with some type of disadvantaged group in a broad sense, for instance with microfinance clients (e.g. in Colombia or Paraguay), with homeless people (e.g. in the United States), with public housing residents (United Kingdom), with ex-convicts (United States) and with small-holder farmers (e.g. in Costa Rica, Ecuador, Honduras). However, there are also project contexts that aim for a very broad reach, including the ‘companies without poverty’ programme where the tool is used with blue-collar workers (e.g. in Mexico, Paraguay), the Cerrito programme in Paraguay where the project is implemented with an entire community, or the Semaforismo project in Paraguay where the tool is made available to entire municipalities.

Poverty Stoplight recommends working with entire families (or representatives thereof) because this is the relevant social unit where change can most easily happen. However, some partners opt to work with individuals given their specific context.

There is no age limit for clients, although in general clients are adults.

Participation in the coaching programme is purely voluntary.

The enrolment of clients also depends on the implementing organisation and programme context. For instance, in Fundación Paraguaya’s microfinance programme, microfinance clients are invited to participate by their loan officers (who then are also their mentors). In the Salvation Army programme working with people experiencing homelessness in California, people are invited to join during intake procedures at local shelters. In Ecuador, the Ministry of Agriculture and Livestock invited farmers to participate in the programme and

offered them technical assistance. Volcafé, Nelixia and other multinational organisations implement it with their suppliers (smallholder farmers) of raw materials.

#### Who are the coaches?

The recruitment of coaches is carried out by the organisation in charge of the programme adaptation. Depending on the specific project/programme, mentors might be recruited specifically for Poverty Stoplight, or existing case workers / project staff might be trained to use the tool as part of their current role. In general, coaches are employed by NGOs, microfinance institutions or other non-profit entities, but they may also be public employees.

The headquarter organisation provides programme training to the partner organisations. When a new partner joins the Poverty Stoplight community, the Poverty Stoplight Global team provides the partner organisation with a 1-week training session (which includes a range of topics, from indicator adaptation to business plan development and the design of the mentoring component). The partner organisations are then responsible themselves for training and supervising their mentors. Implementing organisations are also encouraged to fill in a 'solutions databank' that explicitly maps services and other solutions that are available for specific Poverty Stoplight indicators, which can then constitute a crucial resource for coaches in their support to clients.

In general, desired skills for mentors are motivation and ability to convene people to solve problems; leadership and acceptance within the community; strong communication skills; active listening; fluency in reading and writing; and basic ability to use mobile devices.

Coaches are expected to be a periodic point of contact for families through personal visits and telephone contacts to monitor families' progress directly; to connect families to resources and solutions identified by/available from the programme; to reinforce the skills and strengths of each family, using them to leverage improvements in their 'improvement areas'; to improve self-confidence and encourage behaviour change; and to provide the organisation implementing the Poverty Stoplight with real-time information about what is happening in the community in order to solve problems, if any, or to connect with other strategic allies that will collaborate in the resolution of the problem.

#### Impact

The impact of the programme has been measured through a large set of studies<sup>(50)</sup>. The immediate desired outcome of the programme is to reduce the number of red and yellow indicators (i.e. the number of indicators in which a client is 'very poor' or 'poor') and, conversely, to increase the number of green indicators (i.e. the number of indicators in which a client is 'not poor').

The programme has used different techniques to measure the attainment of the desired outcomes, for instance by comparing the percentages of red and yellow indicators between baseline and follow-up surveys, at the indicator level as well as the aggregate level; and aggregating the number of reported deprivations in diverse ways and comparing this aggregate measure between baseline and follow-up surveys. Such aggregation included calculating poverty scores as well as constructing an Alkire-Foster-type multidimensional poverty index from the data.

Evidence from a growing number of RCT studies shows that those participating in the Poverty Stoplight programme are more likely to decrease their deprivations than their peers<sup>(51)</sup>.

Another important aim of the programme is to increase clients' critical and collective agency. The programme has experimented with different ways to measure and track this complex concept. Results based on

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<sup>(50)</sup> See Budzyna (2013); Burt (2016); Cosentino (2019); Hammler et al. (2018); Pane Solis et al. (2019); Sant-Miller and Hammler (2021).

<sup>(51)</sup> See Budzyna (2013); Burt and Hammler (2014); Cosentino (2019); Hammler (2018); Pane Solis (2010); Sant-Miller (2021).

participatory, qualitative research suggest that the programme increases clients' agency by enhancing aspirations and empowering clients to work towards a better future for themselves <sup>(52)</sup>.

An additional impact of the programme is that it may raise awareness in public actors of existing needs of people in poverty. Some organisations use aggregated data to present the results of extreme poverty or general poverty indicators to policymakers, as for example in Paraguay with the Ministry of Housing, which created the 'Empleogar' policy thanks to the management of the 'Companies without Poverty' network. The use of georeferencing in the Poverty Stoplight survey makes it easier to map specific needs and for policymakers to approach and design appropriate interventions.

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<sup>(52)</sup> See Cosentino (2019); Pane Solis (2019); Tellez et al. (2020).

## MY FAMILY'S STOPLIGHT



## family stoplight

We have enough income 1	We have savings 2	We have access to credit 3	We have different sources of income 4	We have forms of ID 5	We live in a healthy environment 6	We manage our garbage well 7	We have a faucet 8	We have access to health services 9	We have good nutrition 10
We have good hygiene 11	We get tested as needed 12	We have healthy teeth 13	We have healthy vision 14	We are vaccinated 15	We have insurance 16	We have a safe home 17	We have enough furniture and amenities 18	We have separate bedrooms 19	We have a raised and ventilated kitchen 20
We have a modern bathroom 21	We have a refrigerator and other goods 22	We have a phone 23	We have fresh clothes everyday 24	My family hasn't been assaulted 25	My family hasn't been robbed 26	We have electricity 27	We have regular transportation 28	We have accessible roads 29	Our children go to school 30
We know how to read and write 31	We have school supplies 32	We have a budget 33	We know how to make an income 34	We have internet access and TV 35	We have hobbies 36	We respect differences 37	We respect human rights 38	Our children don't work 39	We are part of a group 40
We know how to petition authorities 41	We solve our own problems 42	We vote in elections 43	We have a family life plan 44	I trust in my abilities and achievements 45	We consider others in decision-making 46	We control our emotions 47	We have no violence in our family 48	We have an entrepreneurial spirit 49	I have control over my life decisions 50

# OUR LIFE MAP

Our priorities	Why don't I have it?	What do I do to attain it?	When will I have it?	FOLLOW-UP		
				Date	Date	Date
1 Family savings	Not enough money	Save USD 0.50 a week (do not buy soda)	21 Aug 2018			
2 Income above poverty line	Not enough sales	Expand reach of my business	1 Aug 2018			
3 Part of groups	I don't know of any groups	Find a group in my community (church)	30 Jul 2018			
4 Diversified sources of income	Child in school	Find a job for 18 year old son	15 Aug 2018			
5 Vaccinated	Don't know of any clinics in the community	Find a clinic nearby	30 Aug 2018			

**Our strengths**

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**Our next goals**

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## Territoires Zéro Chômeur de Longue Durée



### What is it? Background and aims

The programme described is called Territoires Zéro Chômeur de Longue Durée (TZCLD), which translates as territories with zero long-term unemployment. It was launched in 2016 as a government initiative in France<sup>(53)</sup> with the aim of eliminating long-term unemployment in specific geographical areas. The programme operates under the belief that employment is a fundamental right, and seeks to create subsidised enterprises to generate job opportunities. It is important to note that participation in the programme is entirely voluntary.

The national-level implementation of TZCLD is overseen by two organisations: Experimentation Territoriale Contre le Chômage de Longue Durée (ETCLD) and TZCLD. ETCLD is a non-profit organisation established by law in 2016<sup>(54)</sup>, and serves as an intermediary between the government and local TZCLD projects<sup>(55)</sup> in various territories. It coordinates funding and provides supervision to individual TZCLD projects. TZCLD, on the other hand, is a civil society organisation focused on advocacy for the programme, analysing project performance, and preparing new territories to be included in the programme.

The programme is based on three key principles.

1. Nobody is unemployable<sup>(56)</sup> if working conditions are tailored to their needs.
2. The issue is not a shortage of work but a shortage of jobs. Entrepreneurial activities can be created based on the assessment of individuals' competences and the needs of local communities.
3. Money is not a limiting factor since authorities already bear the costs of unemployment and its consequences.

At the local level, the implementation of a TZCLD project begins with the establishment of a local committee for employment (LCE). This committee includes various stakeholders such as businesses, civil society organisations, local government authorities and individuals who are permanently deprived of employment. The LCE's role is to identify and reach out to individuals facing long-term unemployment, find appropriate solutions for their needs, maintain local consensus, and identify unmet needs within the community that can be addressed through productive work. The final step for the LCE is to establish one or more enterprises for

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<sup>(53)</sup> Loi n° 2016-231 d'expérimentation territoriale visant à résorber le chômage de longue durée (<https://www.legifrance.gouv.fr/loda/id/JORFTEXT000032134592>). This law was passed unanimously both by the French National Assembly and the French Senate.

<sup>(54)</sup> Loi n° 2016-231 d'expérimentation territoriale visant à résorber le chômage de longue durée (<https://www.legifrance.gouv.fr/loda/id/JORFTEXT000032134592>). This law was passed unanimously both by the French National Assembly and the French Senate.

<sup>(55)</sup> In the preparation of this report, the local project from Joinville, Nouvelle Equation, represented the project (<https://mairie-joinville.fr/en/rb/536265/territoire-zero-chomeur-de-longue-duree>).

<sup>(56)</sup> Unemployment is not a choice; the unemployed are people permanently deprived of employment.



employment purposes (EEPs). These enterprises are designed to match community needs with the skills and desired skills development of the prospective clients, aiming for economic self-sustainability.

How does it work?

A human-centred approach. The TZCLD programme follows a human-centred approach, where EEPs are created in collaboration with the people who are deprived of employment. The government funds these enterprises, and individuals are hired without any selection process or job interviews, with open-ended contracts. The EEPs focus on inclusive activities that align with the skills and desires of the participants. These activities are non-profit and do not compete with other enterprises in the territory. Clients actively participate in co-designing the activities based on the local community's needs.

The TZCLD programme relies on strong cooperation with local partners in areas such as employment, the economy, public employment services, social institutions, and associations. The methodology used by each territory is validated by the LCE.

Where is the TZCLD programme applied, and by whom?

The 2016 TZCLD law established that the programme would run in 10 territories over 5 years. The second law voted for in 2021 envisaged the extension of the programme to at least 50 new ones by 2026 <sup>(57)</sup>.

The programme is developed in very diverse territories (rural, urban or outer-urban) in France. The size of the territory is between 5 000 and 10 000 inhabitants; they are selected because they suffer from comparatively high poverty rates and unemployment.

The national TZCLD association provides the local organisations with a general methodology, but developments at local level are tailored to local needs. Indeed, territories are encouraged by the national association to respect broad principles (such as non-selection hiring and the obligation to try to mobilise every single unemployed person) but they are also free to tailor their strategic choices with all the local partners that are part of the LCE.

Duration. The creation of a TZCLD project typically takes around 3 years, depending on local laws and the habilitation process required to secure government funds for establishing the EEPs. Throughout this period, clients are coached by the project team to identify the most suitable solutions for their situations and expectations.

Who are the clients?

The clients of TZCLD are individuals who are deprived of employment. The programme reaches out to potential participants through various means, such as participation in events and door-to-door outreach, with support from local mayors. Clients can also be referred to the programme by local partners. In Joinville, for example, the average profile of clients is between 40 and 50 years old, with approximately 8 years of unemployment. Many clients receive minimum income or disability allowances, and a significant number have recognised disabilities. Participation in the programme is open to all unemployed individuals who have been unemployed for over 1 year and have been living in the territory for at least 6 months.

Who are the coaches?

The coaches involved in the TZCLD programme in Joinville have a qualification diploma in social studies. They receive training from TZCLD, and their work is supervised and supported by qualified administrators. The desired qualities for coaches include openness, adaptability, understanding of clients' issues, patience, active listening skills and a non-judgemental attitude.

Costs. For the project in Joinville, for instance, the funds up to June 2022 were about EUR 80 000 per year, including transfers, enterprise creation and coaching – which proved barely sufficient considering that more than 30 people were participating in the coaching programme.

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<sup>(57)</sup> Loi n° 2020-1577 du 14 décembre 2020 relative au renforcement de l'inclusion dans l'emploi par l'activité économique et à l'expérimentation 'territoire zéro chômeur de longue durée' (<https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000042665434>).

## Impact

The TZCLD programme has undergone evaluations conducted by a scientific committee appointed by law and chosen by the Labour Ministry. The initial evaluation of the programme showed that between January 2017 and July 2022, 1 500 people were employed through TZCLD across the 10 territories, with 500 of them subsequently finding regular employment outside of the EEPs <sup>(58)</sup>. The programme's work is tailored to meet the specific needs of each local territory, with a focus on contributing to ecological transition (43.4 %), local development (21.8 %) and social cohesion (16.4 %). It was found that 48 % of the participants would not have found employment outside of the programme, and nearly 50 % of them would not have obtained permanent contracts without the programme <sup>(59)</sup>.

The impact of the programme extends beyond employment, as it improves the well-being of individuals, helps build communities, and acts as a basis for experimentation and innovation. Participants reported a sense of purpose in their work, increased self-confidence, improved family relationships and better material living conditions. The programme also addresses other issues faced by clients, such as geographical mobility, health, addiction, finances and personal behaviour in the workplace.

To further understand the effects of the right to employment, an observatory was launched in 2022 by the national coordinators of TZCLD. The observatory collects data and conducts research on the programme's impact on territories, the EEPs, employees and people deprived of employment. This observatory relies on a free-access database <sup>(60)</sup> with more than 200 documents about the project in France and other European initiatives, and with 60 researchers working all around France on the right to employment and access to other rights: territorial regulation and institutional dynamics at the local and national levels; and on social impact measures and creation of value. It also facilitates comparative research in different European contexts, including in Wallonia (Belgium) and Rome (Italy), to explore the evolution of the concept of the right to employment in various political, administrative and economic settings.

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<sup>(58)</sup> The second phase of the experimentation started in July 2021; now the programme has 21 EEPs all around France and it employs around 1 500 people.

<sup>(59)</sup> Labour Ministry evaluation (<https://dares.travail-emploi.gouv.fr/publication/experimentation-territoires-zero-chomeur-de-longue-duree>).

<sup>(60)</sup> <https://www.tzclld.fr/ressources/observatoire-de-tzclld/>.

## Annex 2. Examples of multidimensional coaching for marginalised communities

The following two examples concern long-standing programmes that are mainly designed for Roma communities in Europe. While they share many features of multidimensional coaching practices, they are different in aims and specific ambitions.

## UNDP community coaching

### What is it? Background and aims

The United Nations Development Programme, with funding from the EU, national governments and major NGOs such as the Open Society Foundation, has supported a series of pilot projects and programmes aimed at promoting local development and inclusion for communities in vulnerable situations. These initiatives include programmes targeting rural areas with a significant segregated Roma population in Hungary (Cserehat Programme), integrated urban development pilot projects promoting inclusion in cities with a large segregated Roma population at a regional level (BRC Regional Roma Initiative in Hungary, North Macedonia, Romania, and Turkey) <sup>(61)</sup>, programmes for community-led rural development in Moldova (SARD LEADER) focusing on minority-populated regions <sup>(62)</sup>, and a community-led development programme in conflict zones in Armenia <sup>(63)</sup>. Additionally, there is an integrated urban development pilot project in the Hungarian town of Miskolc <sup>(64)</sup>.

### How does it work?

The area-based development approach has been utilised in areas facing complex socioeconomic challenges such as post-conflict situations, poverty, exclusion and disaster. In these situations, recognising and valuing the collective resources of the community is crucial for improving the socioeconomic conditions (Santini et al., 2012). These situations are characterised by a lack of local initiatives, social cohesion, knowledge, information and know-how, which in turn negatively affects the socioeconomic outlook of the area, creating a downwards spiral.

In this context, community coaching serves as a tool to mobilise development stakeholders and resources. Its goal is to engage all interest groups within the target area, encourage their members to take action, unlock their full potential, and build social capital through cooperation. Community coaching facilitates enhanced local and territorial governance and participation, which are essential for effective and responsive interventions and solutions that resonate with the community.

In summary, community coaching involves mobilising and empowering previously passive communities and their members, enabling them to become active participants in development, leveraging their full potential, and accumulating social capital through collaboration, including with the most vulnerable individuals in the community.

The basic steps of the coaching process include:

1. Mobilisation phase. Establishing a foundation, building connections, fostering trust between the coach and community members, mapping partners and ideas, organising group discussions to identify

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<sup>(61)</sup> The programme included Pécs in Hungary and Cluj-Napoca, Braila and Galati in Romania. Funded by UNDP, the Open Society Foundation and the EU (through national operational programmes using a multifund approach).

<sup>(62)</sup> EUD-UNDP SARD Programme, Republic of Moldova (2016–2019), in the Autonomous Territorial Unit of Gagauzia (Gagauzians) and Taraclia Region (Bulgarians). Funded by the European Neighbourhood Instrument (<https://www.leadermoldova.eu>).

<sup>(63)</sup> EUD-UNDP LEAD Programme, Armenia (2018–2024), targeting Lori and Tavush, the most disadvantaged administrative regions in Armenia. The eastern part of Tavush region is in a conflict zone. There is a high number of displaced people in Lori and Tavush (from the conflict zones). Funded by the European Neighbourhood Instrument ([https://www.facebook.com/EULEAD4LoriTavush/?ref=page\\_internal](https://www.facebook.com/EULEAD4LoriTavush/?ref=page_internal)).

<sup>(64)</sup> Making Miskolc a place for everyone. EaSI 4IM pilot in Miskolc: integrated urban development pilot project for inclusion in Miskolc city in Hungary. Municipality of Miskolc awarded under the EU VP/2020/003 call for proposals on social innovation.

common understanding of needs, resources and visions, as well as providing animation, communication and mediation.

2. Capacity development and planning phase. Facilitating (re)organisation and self-representation, participatory planning, implementing small common actions and establishing/strengthening partnerships.
3. Change making. Improving self-organisation, empowerment, leadership, connecting with other initiatives and networks, and implementing and monitoring collectively agreed plans.
4. Localising development. Coaches gradually withdraw from the target society as the community takes over.

On average, the coaching process lasts around 3 years.

Where is it applied, and by whom?

As mentioned earlier, this methodology is applied in areas with significant socioeconomic challenges. Each area has its own specific issues, requiring adaptation of the methodology based on the project's goals, the unique social, economic and environmental situation and the challenges of the target area, as well as its cultural context and the specific needs of disadvantaged groups (vulnerable/discriminated/isolated/segregated/displaced/refugee, etc.) within the target area.

Who are the clients?

Community coaching targets the entire society of the given target area, whether it is a delineated rural area or a city, rather than focusing on families, individuals or specific disadvantaged groups. The purpose of community coaching is to mobilise and activate the local population. Therefore, the clients are the various stakeholder groups in the area.

The coaches engage with all stakeholder groups within the target area and foster dialogue and partnership among them. Clients become involved voluntarily through a systematic local mobilisation campaign. All stakeholders are considered members of the target group and are represented in decision-making processes related to the development initiatives. They actively participate as actors in the development process.

Who are the coaches?

The implementing organisation of the projects is responsible for providing coaching, and it selects coaches through a rigorous process. Coaches can be hired by the implementing organisation itself, a sub-contracted partner organisation or the local authority (as is the case in Miskolc). These coaches are local development professionals who undergo a selection process that includes qualification exams, interviews and specific training. They receive ongoing training and participate in regular meetings. Coaches are supervised based on performance and results, with in vivo supervision.

To be effective, coaches must possess certain qualities. They should have an open and inclusive attitude and be driven to effect change. Strong communication and public speaking skills are essential, as well as the ability to motivate others. Coaches should possess leadership skills and hold strong democratic values. They should be flexible and have significant experience working with communities. Additionally, they should possess comprehensive knowledge and understanding of strategic planning, project generation, local business, and environmental and social development, as well as skills in local mobilisation, conflict prevention and mediation.

Impact

The primary goal of community coaching is to reorganise the target society in a way that enables it to perform better independently. As a result, the coaching process aims to motivate service providers and foster openness to innovation. It also strives to create new formal and informal organisations, both social- and business oriented. Moreover, the coaching process aims to give disadvantaged groups a voice in local governance.

Currently, the programmes are primarily evaluated based on quality indicators specific to each project.

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ROMACT programme  
Building capacity for the  
inclusion of Roma at local level



[www.coe-romact.org](http://www.coe-romact.org)

What is it? Background and aims

The marginalisation and poverty of a significant proportion of Roma is visible throughout Europe. Concrete and adequate action is required to tackle the social and economic issues Roma face, and this cannot be achieved without the strong political will, commitment and resources of state authorities, or without the active involvement of Roma.

However, many local authorities are facing limitations and constraints in terms of adequate human and financial resources, as well as various political circumstances and structural blockages that interfere with the effective implementation of policies at local level.

Moreover, a lack of the expertise and resources that are necessary to develop integrated actions for tackling the multifaceted problems of marginalised communities, as well as the lack of mutual trust between local administrations and Roma communities, create a significant barrier that hinders the progress of social inclusion for Roma.

Since 2013, the Council of Europe and the European Commission have been implementing the Joint Programme ROMACT – “Building up political will and understanding of Roma inclusion at local and regional level”, set on the existing European and national policy frameworks for Roma inclusion, which acknowledges the fact that measures at local and regional level are decisive for generating improvement in Roma communities across key areas such as education, housing, employment and health.

The objective of the ROMACT programme is building the capacity of local authorities to develop and implement plans and projects for Roma inclusion, based on the concrete needs and priorities of marginalised local Roma communities.

Considering the fact that policy change and capacity building are long-term processes, ROMACT provides expertise to local stakeholders, employing an integrated approach and striving for local solutions by local people for local needs. It also builds on previous achievements in the field and lessons learned from national and European experiences.

From 2013 to 2017, the programme was implemented in the following six countries: Bulgaria, Czech Republic, Hungary, Italy, Romania and Slovak Republic. Since 2018, ROMACT has focused exclusively on Bulgaria and Romania.

How does it work?

The programme helps local authorities to improve the lives of all citizens, including the Roma, by jointly assessing needs, planning actions together with all those concerned and facilitating the translation of these plans into concrete measures.

The ROMACT methodology consists of four steps, implemented over a period of 18 to 22 months at each municipal level:

1. raising awareness and building the commitment of local authorities towards Roma inclusion;
2. agreeing on what needs to be done to improve the living conditions of the Roma community;
3. translating the local development action plans into concrete measures and projects;
4. funding, implementing and monitoring measures and projects.

The ROMACT methodology is presented in the ROMACT handbook (available in Bulgarian, Czech, English, Hungarian, Italian, Romanian and Slovak).

An important element of the ROMACT methodology is the community/citizens' action group (CAG), an informal group that is established at the beginning of the process, and which is expected to become a partner of the municipality in facilitating the participation of Roma citizens in the local development process.

One other important element of the ROMACT process is represented by the working group at the level of the local administration – the Task Force for Roma Inclusion, which includes representatives of concerned municipal services and other local institutions (schools, healthcare institutions, cultural and religious institutions, etc.), relevant local NGOs, representatives of the community/citizens (CAG) and a coordinator from the side of the municipality (person designated by the mayor to be in charge of the process).

The work of these two groups interlinks and provides the necessary input for assessment, development and implementation of measures that have the aim of improving the living conditions and status of marginalised communities, including Roma.

At operational level, the ROMACT programme works through a team of field coordinators, community facilitators and experts in each municipality, guiding the processes to achieve concrete results through the implementation of short-, medium- and long-term activities and plans. The facilitators mobilise the groups of citizens/CAGs, support the empowerment of citizens to participate in the local development process and make the links with the work at the level of the local administration. Based on assessed needs, experts are punctually engaged to provide training and coaching to the representatives of the local administration and other relevant stakeholders, supporting them in strategic planning, identifying sources of funding (EU, national, etc.) and developing projects based on the measures included in the Joint Action Plans/Local Development Strategies, responding therefore to the needs of the local communities.

The capacity building activities provided by the ROMACT experts are delivered based on the needs and requests expressed at local level, and have as target groups the local citizens, the elected officials, the municipal staff (public servants/employees of different departments) and other different local stakeholders (representatives of health facilities, schools, decentralised offices of regional and national institutions, NGOs, etc.).

In addition, since the ROMACT experts and facilitators are directly exposed to the implementation of various policies and regulations in the field, working directly with employees of the local administrations, the programme also brings evidence from the ground on a number of issues encountered in the field. Based on recurrent issues encountered in the field, the programme has designated experts to work on briefings, guidelines and reports on the barriers encountered in the implementation of certain rules and regulations in practice, as well as on the existent issues related to the disbursement and use of EU funds.

The ROMACT central team is based in the Council of Europe, in Strasbourg, and is responsible for the overall management of the programme.

In each country, ROMACT is implemented by a national support team composed of coordinators, facilitators and experts.

Selected support organisations are mandated to ensure the logistical needs for the implementation of the process at local level by the ROMACT National Support Teams.

Who are the clients?

The programme is designed to support local public administrations (the elected representatives and relevant officials, public servants, relevant staff of local institutions/services) and the Roma citizens from ROMACT municipalities.

In the longer term, the clients are the Roma citizens and the overall population of the targeted municipalities in general.

Overall, the programme has been providing support to 148 municipalities in Bulgaria and Romania.

Who are the coaches?

The coaches are ROMACT national team members including national project officers, national facilitators coordinators, and national experts coordinators, facilitators and experts.

The recruitment of facilitators is dealt with locally by ROMACT national support teams at local level in close cooperation. ROMACT facilitators have a professional background in the fields of Roma/social inclusion, policies, public administration and access to funding.

Experts are contracted based on needs through international calls by the ROMACT management team. ROMACT experts' fields of expertise include accessing funds from the EU/operational programmes and from other donors and accessing funds for small and large-scale infrastructure projects, project cycle management, public procurement, strategic planning, Roma/social inclusion, social protection and children's rights, research and analysis, legal provisions, etc.

Quality assurance, methodology development and improvement are ensured by the ROMACT national coordination team (national project officer, national facilitators coordinators and national experts coordinators) in close cooperation with the ROMACT management team.

### Impact

Since 2018, ROMACT has focused only on Bulgaria and Romania where it has covered over 140 municipalities. Overall, the programme invests approximately EUR 25 000 per municipality per year. In municipalities that have demonstrated commitment towards Roma inclusion, concrete results have been achieved. In Romania and Bulgaria, since the start of the programme, 117 action plans have jointly been prepared by representatives of local administrations and Roma citizens and have started to be implemented with the budget allocated from local, national and EU funding. Eighty-five of these plans were adopted also by the local councils, with increased commitment and broader recognition for the needs at local level. Based on the measures listed in the action plans developed during the ROMACT process, and with the direct support of ROMACT experts, by the end of July 2022, 225 project proposals were submitted to different funding programmes – national and EU funds (European Regional Development Fund and European Social Fund). A hundred and twenty-one of these projects were approved, generating more than EUR 150 million for municipalities in Bulgaria and Romania to improve the situation of marginalised communities.

Besides supporting local authorities to absorb EU funds and identify sources of funding for projects covering medium- to longer term measures, during the ROMACT process other different medium- and short-term actions and investments are included in the jointly developed strategies and plans and start to be implemented. Some of the actions also implemented as a result of the ROMACT facilitation and involvement of the CAGs are: employment of (health, education, labour, etc.) mediators, teachers, doctors and police officers, appointment of local experts on Roma issues at municipal level, establishment of community centres, small infrastructure works (street paving, connection to electricity, water and sewage networks, rehabilitation/repair of school and kindergarten facilities, etc.), building playgrounds and parks in Roma neighbourhoods, waste collection, landfill clearance, cleaning and placing of (additional) garbage containers, provision of legal aid, lifting kindergarten fees, providing free transport to kindergartens and schools, remedial educational programmes, registration of undocumented Roma – IDs, birth certificates, etc., including identification papers for Roma children born abroad, celebratory/cultural events bringing citizens together, provision of humanitarian and emergency aid, social housing allocation, legalising procedures for Roma neighbourhoods and provision of property documents, campaigns for immunisation against measles, campaign against school drop-out, job apprenticeships and counselling, job fairs and information campaigns regarding access to the labour market for unemployed Roma (especially Roma youth), and community initiatives.

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