

IEMD Evaluation Plan

2026-2030

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1. Introduction & Overview

The IndyEast Economic Mobility District (IEMD) represents the next chapter in a long history of cross-sector collaboration aimed at advancing upward mobility and expanding opportunity on Indianapolis’s east side. It builds on the foundation of initiatives such as the Super Bowl Legacy Project, the IndyEast Promise Zone, and the IndyEast Promise Neighborhood, as well as Quality of Life plans for the Martindale-Brightwood, Near East, and Southeast communities. These and other community-driven efforts have delivered tangible progress in housing, education, and economic opportunity, while deepening collaboration among community partners.

This evaluation is intended to support the implementation of IEMD strategies by offering a structure for monitoring progress and organizing shared reflection over time. It is designed to align with the initiative’s focus areas in economic development, housing, and workforce development, while remaining flexible enough to accommodate shifts in emphasis or approach.

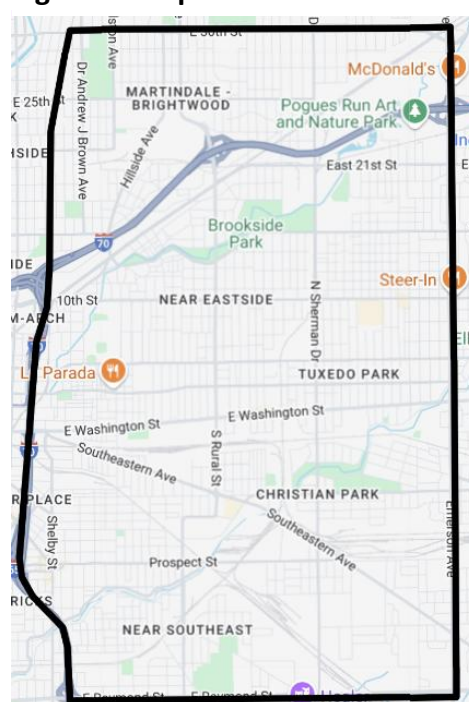
This introductory section of the plan discusses the context for the initiative and its evaluation, establishes guiding principles, and notes challenges that were considered and navigated in framing the evaluation plan. Section 2 details the structure for the evaluation, and outlines—at a high level—IEMD goals and indicators that will be tracked and reported upon. Section 3 serves as a technical guide to evaluation: outlining data sources, establishing measurement considerations and timelines; detailing governance and staffing plans; and addressing related concerns that will guide implementation of the evaluation effort.

1.1 Context

The IEMD emerged from years of coordinated work and deepening relationships among community-based organizations across Indianapolis’s east side. Building on collaborative infrastructure established prior to and during the IndyEast Promise Zone and related initiatives, the IEMD reflects an effort to extend that alignment—linking the work of individual neighborhoods and organizations into a shared structure that supports parallel efforts in economic development, housing, and workforce development.

The IEMD geography encompasses the area bounded by Raymond Street to the south, Emerson Avenue to the east, 30th Street to the north, and I-65 and the Monon Trail to the west (see Figure 1). This area corresponds with the primary service areas of the three anchor community

Figure 1. Map of IEMD



centers—John Boner Neighborhood Centers, Edna Martin Christian Center, and Southeast Community Services—and includes additional partners such as neighborhood-based community development corporations, with additional support from housing, workforce and economic development organizations that operate within larger geographic areas. These organizations bring deep local knowledge, long-standing relationships, and a history of complementary programming to the work of the district.

The IEMD initiative is also informed by, and complements, the Quality of Life plans and other efforts being advanced by the neighborhoods within the district. These plans are actively used to shape local priorities and guide implementation efforts at the neighborhood level. The IEMD draws on these plans—offering a cross-neighborhood platform for coordination and shared learning. In this way, the IEMD serves as both an extension of neighborhood planning efforts and a facilitator of collaborative strategies aimed at long-term impact.

The IEMD’s vision is a vibrant, inclusive and welcoming community in which all families have access to the tools, support, and resources to achieve economic mobility and to build generational wealth. This vision serves as the organizing principle for collaborative work among IEMD partners. While individual strategies continue to reflect each organization’s unique role and relationships, the district model provides a structure for aligning these efforts and identifying opportunities to reinforce one another’s work. IEMD coordination is guided by a Neighborhood Center Partners or Alliance—referred to herein as the Coordinating Committee—comprised of the directors of the three anchor community centers and designated staff, each of whom are working in partnership with a broad array of east side stakeholders.

1.2 Key Functions of the Evaluation

The IEMD evaluation is intended to serve multiple functions for a range of users. At its core, it offers a practical structure for organizing information about program activities and outcomes. It is meant to serve as a shared reference point throughout implementation—helping partners stay aligned, clarify what is being tracked and why, and maintain focus on what the initiative is working toward.

The evaluation is also intended to support continuous improvement by providing a foundation for reflection and adjustment over time. The primary mechanism through which the evaluation will support continuous improvement will be through a defined and regular data collection and reporting cadence and annual syntheses of evaluation findings to provide IEMD leadership with a consolidated view of progress, trends, and lessons learned.

The evaluation also supports communication and accountability to external stakeholders. Its structure strives to organize insights in a way that supports communication with external

audiences—such as funders and community stakeholders—while remaining connected to the same processes used for internal coordination and learning.

Table 1.1 summarizes how the evaluation responds to the needs of different audiences involved in the IEMD, and the purposes it is intended to support for each.

Table 1.1: Evaluation Audiences and Intended Functions

Audience	Primary Functions of IEMD Evaluation
Community Centers & Program Partners	Track implementation progress and emerging outcomes; support reflection and local decision-making; align with internal systems where feasible
Funders	Provide a consistent framework for understanding activities, milestones, and progress over time
Community Members & Stakeholders	Share accessible information about what is being done and why; demonstrate progress, and support transparency and public accountability
Coordinating Committee / District-Level Strategy	Provide structure for shared tracking across domains; support planning and long-term alignment among partners

Effective communication will be a core function of the evaluation effort. Reporting should aim to make information accessible, meaningful, and understandable for the audiences identified above. Whenever possible, findings should be summarized in formats that are clear, timely, and relevant to both implementation partners and the broader community. The specific tools, methods, and formats used to capture, summarize, and present data are intended to be responsive to the needs of the district as strategies are implemented and as conditions evolve.

While this evaluation is focused on the 2026–2030 implementation period, its structure and components are intended to have enduring value. The indicators and systems developed through this effort can support future reflection, adaptation, or expansion.

1.3 Guiding Principles

This plan is grounded in a set of guiding principles: core ideas that shaped the structure of the plan and framed decisions throughout its development. These principles reflect both the practical realities of implementation and the broader aspirations of the effort. Collectively, they represent a set of shared orientations that help partners remain focused and coordinated as strategies move into implementation.

At its core, the evaluation strives for simplicity and clarity, while still reflecting the breadth of this effort and the realities of operating within a dynamic environment. Thorny challenges undoubtedly exist—including, but not limited to, limitations in data availability and the difficulty of assessing attribution—but the evaluation approach recognizes and seeks to manage these constraints.

Its structure centers on community-level goals, toward which the district's strategies are directed, while also attending to the near-term actions and indicators (contributing and leading indicators, respectively) most directly shaped by district-led implementation. In doing so, the evaluation seeks to simplify a complex landscape: aligning strategies toward shared outcomes, grounding measurement in what is feasible, and focusing on areas where evaluation can generate useful insights. This structure is more fully developed in **Section 2: Measurement Framework**.

This framework builds on the measurement practices and systems partners already use to manage and report on their work. In many cases, these efforts are tied to existing data systems and common funder requirements, providing a practical foundation for tracking progress without the need to build new infrastructure from scratch. By leveraging existing frameworks and practices, the evaluation reinforces shared goals, supports alignment across partners, and ensures evaluation remains aligned with implementation.

Rooted in the IEMD's broader orientation toward collaboration and capacity-building, the evaluation is designed to reinforce positive, community-level change. It seeks to illuminate collective progress and identify opportunities to deepen coordination, expand capacity, or attract additional investment. Its focus is on offering insight and reinforcing collaborative routines, particularly in ways that support partners as they navigate complexity and advance common goals.

The evaluation approach emphasizes progress that is both meaningful and measurable within the implementation period, while acknowledging that some outcomes will develop over time, beyond the immediate implementation period. This evaluation's structure is designed to balance this dual focus—linking near-term efforts and indicators to broader community goals, and helping partners stay oriented toward impact even when results unfold gradually.

Change at the community level is rarely the result of any single program or organization. The IEMD operates within a dynamic environment, where multiple organizations and efforts intersect and interact in pursuit of broader outcomes. This evaluation approach reflects that reality by avoiding simplistic causal claims and instead seeking to understand how district-led activities align with and support broader patterns of progress. The focus is on illuminating intersections, identifying momentum, and highlighting where momentum is building and where district-led strategies are contributing to broader patterns of change.

1.4 Implementation Considerations

Implementing the IEMD evaluation will require attention to a range of logistical, technical, and contextual challenges. The following introduces these challenges, and **Section 3: Monitoring &**

Performance Measurement Guide provides additional technical detail in navigating these realities.

Coordinating Implementation and Evaluation. Coordinating implementation and evaluation from the outset strengthens both. Feedback from implementing partners, within the planning phase, has helped shape which outputs are tracked and how progress will be interpreted. When those connections are clear, evaluation findings become more useful for learning and decision-making. Maintaining this connection over time will help ensure the evaluation remains grounded in current practice and responsive to emerging insights.

Using Available Data Effectively. Effective coordination also depends on the availability and quality of data sources, including public datasets, administrative records, and, where necessary, licensed third-party products. Each of these has characteristics that affect what can be measured, when, and at what level of geographic precision. These challenges are structural, shaping the feasibility, timing, and interpretability of nearly every aspect of evaluation.

Many public datasets are available at the census tract level, but they are often released at least 12–18 months after the period they cover, frequently based on multi-year averages, and may not offer the desired level of detail in areas such as workforce dynamics, business activity, or household-level outcomes. Proprietary data can offer more frequent updates or modeled insights at smaller geographies, but those improvements often come with tradeoffs—cost, black-box methodology, and they are often modeled using the same underlying public sources. Even when spatial coverage is strong, margins of error may limit usefulness, particularly when aggregating across a small number of tracts or tracking change over short timeframes.

In a few domains—especially workforce and economic development—publicly available data may be too infrequent, too coarse, or too lagged to serve the purposes of this evaluation. In these cases, the evaluation may supplement available data with proprietary data acquisitions. Where paid data are used, the evaluation will document the source and note any known methodological considerations.

Often, the most useful data will be held by local partners, particularly those managing programs or interventions funded through the initiative. These data are often timelier and more granular than external sources. Using these data for evaluation will depend on a shared commitment to ongoing reporting, active coordination between implementing and oversight partners, leveraging existing reporting standards, and a clear understanding of how data will be accessed and used. Aligning implementation and evaluation will be essential to make this possible.

Ensuring Timely and Consistent Partner Reporting. The transfer of accurate, timely activity data from partners is critical to the evaluation’s ability to capture progress and interpret results. Without it, the evaluation cannot reliably measure contributing indicators—short-term signals

that help interpret progress toward longer-term outcomes—and may face other challenges in interpreting leading indicators. Uneven reporting across partners (timing, frequency, or completeness) can limit what can be measured and complicate interpretation. Reliable, timely reporting is essential not just for tracking activity, but for ensuring that evaluation findings remain useful to those guiding implementation.

Changes in strategy during the grant period may present limitations if new activities or priorities fall outside the original scope of this plan. The evaluation structure accommodates such shifts, provided they remain oriented toward shared community-level goals. Outputs can continue to be tracked as implementation evolves, and new or adapted strategies may be incorporated through adjustments to leading indicators. While some recalibration may be necessary, the framework is flexible enough to remain useful in the face of programmatic change.

Geographic Scope and Coverage. The IEMD footprint aligns closely with a defined set of census tracts, with only a modest deviation. These tracts will form the basis for tracking population-level trends and aggregating community indicators; due to data sources, these census tracts will be used to monitor high-level changes in community-level goals. While the boundaries provide a consistent geographic frame, these geographic boundaries are understood to be flexible in a programmatic sense.

Activities funded through the IEMD grant are to be included in the evaluation by default, even when they fall just outside the official footprint. These represent the most direct and clearly attributable link between implementation and intended outcomes, and their inclusion is not contingent on timing or geography. Activities that are aligned with district goals but not funded through the award may still contribute to community-level goals and, in some cases, may be reflected in leading indicators. However, these activities may generally be excluded from contributing indicators unless they are implemented by a program partner and reported accordingly. This may include activities funded outside the current grant but pursued by implementation partners in conjunction with grant-funded work, or initiatives supported through funding secured by the district.

Most indicators are self-explanatory. Where further definition is needed, detail is provided in the measurement framework in [Section 2](#). These definitions are intended to support consistency across partners and ensure that what gets measured reflects both program logic and evaluative feasibility.

Table 1.2. List of IEMD Census Tracts

IEMD Census Tracts (18097)	
3519	3550
3521	3551
3523	3553
3524	3554
3525	3555
3526	3556
3527	3557
3528	3559
3544	3571
3545	3572
3547	3573
3548	3574
3549	

The evaluation is primarily oriented toward tracking activities and outcomes at the district level, with aggregated findings offering a coherent picture of change across the IEMD geography. In some cases, it may be useful to explore variation by geographic sub-area—or demographic groups—to better understand implementation or identify patterns that can inform future decisions.

Interpreting Change in Context. Interpreting district-level data in context—both across time and in relation to other geographies—can deepen understanding of observed trends. Looking at change over multiple years helps clarify whether current conditions reflect progress, stagnation, or volatility. Comparisons to reference geographies such as Marion County, the metro area, or other geographies can provide additional perspective on whether local patterns reflect broader dynamics or diverge in meaningful ways. These comparisons can also help partners interpret progress in light of broader conditions, providing context for internal planning, communication with stakeholders, or identifying areas where additional support may be needed.

1.5 Evaluation Governance

Ongoing oversight of the evaluation is expected to be the responsibility of the District Director and the Coordinating Committee. The Director will oversee district activities and serve as the primary liaison across partner organizations; as part of this role, the Director is also expected to serve as the main point of contact for the evaluation effort. While specific decision-making protocols are outside the purview of the evaluation plan, the Coordinating Committee is expected to guide implementation, respond to findings, and communicate priorities or changes that may affect the structure or focus of the evaluation.

It is anticipated that organizations participating in—or charged with advancing—district initiatives have entered or will enter into memoranda of understanding (MOUs) clarifying expectations around data sharing, reporting, and coordination with governance and evaluation, among other topics. These agreements will support transparency, establish shared expectations, and ensure that partners have a clear understanding of how data will be used in service to this collaborative effort.

These governance and coordination structures are intended to support a common approach to evaluation, grounded in shared goals, adapted to implementation realities, and aligned with the broader vision of the district. With this foundation in place, the following sections outline the evaluation’s measurement framework and the methods for collecting, analyzing, and sharing data in support of shared learning and accountability.

2. Measurement Framework

The following section establishes the measurement framework for the IEMD by first defining a common structure for organizing outcomes and indicators, and then applying that structure across the core domains of economic development, housing, and workforce development. Its purpose is to clarify what will be measured and how those measures fit together, providing a shared foundation for interpretation, reflection, and reporting. This section focuses on the structure of the framework and the outcomes associated with each domain. Details related to data sources, timing, assumptions, and analytic procedures are addressed separately in [Section 3: Monitoring & Performance Measurement Guide](#).

Within each domain, the framework uses a consistent organizational approach to describe measures in a way that makes them easier to interpret and discuss collectively. This shared structure helps partners see how different areas of work fit within the overall initiative and provides a common basis for evaluation.

2.1 Structure & Rationale

The IEMD's work centers on coordinated and collaborative actions during the grant period that are intended to contribute to lasting change. The evaluation reflects this orientation by pairing longer-term indicators that track progress toward community-level goals with nearer-term indicators that capture activities, investments, and early results within the grant period. Nearer-term indicators are framed within the context of longer-term goals, ensuring that immediate results can be understood as part of the initiative's broader trajectory. Together, this mix of measures provides a way to assess what is happening now while keeping sight of the conditions the initiative aims to shape over time. The framework categorizes types of indicators according to the role they play in understanding progress, from high-level goals to on-the-ground actions and feedback on specific strategies.

Community-level goals capture the broad, long-term conditions that define the IEMD's purpose: fostering a vibrant, inclusive, and welcoming community where all families have the tools, support, and resources to achieve economic mobility and build generational wealth. These goals are the measurable expression of the initiative's vision, framing the kinds of lasting change the effort aims to influence. Changes in the conditions reflected within these goals over time provide a critical reference point for understanding whether the vision for the district is being realized.

Leading indicators capture the initial or near-term outcomes that follow from the actions reflected in the contributing indicators. They show the early effects of program activities—changes that tend to appear more quickly than shifts in community-level

goals—and signal whether the initiative’s efforts are on a plausible path toward advancing the district’s vision.

Contributing indicators—commonly referred to as outputs or activity measures—capture the direct, attributable work of the initiative, such as services delivered, policies implemented, or investments made during the grant period. They connect program activities to the changes reflected in the leading indicators and to the broader shifts the initiative seeks to influence.

Together, these categories create a structure that links day-to-day activity with long-term aspirations, helping partners interpret progress in a shared and meaningful way.

As the initiative progresses, it may be useful or necessary to examine other indicators that are not captured within the typology above. Potential examples include contextual indicators, which track external conditions or trends that could influence progress but are outside the initiative’s control; equity or disparity measures, which disaggregate indicators by race, ethnicity, income, or geography to examine differential impacts; and efficacy signals, which—when available—provide insight into whether specific strategies are being delivered in ways that align with their design and are likely to produce the intended results. These additional measures can help interpret observed trends and add nuance to the core framework without expanding its primary structure.

This framework responds to the practical constraints of evaluating an initiative of this scale. Community-level goals remain important points of orientation, but they are shaped by many forces beyond the IEMD and are often only visible through lagging data. Relying on them alone would provide an incomplete and delayed view of progress. To address this, the framework layers measures of direct activity and near-term change alongside community-level outcomes, making it possible to track progress as it unfolds while still monitoring whether broader conditions are moving in the desired direction.

For this approach to remain credible, those activity- and change-level indicators must be oriented toward the community-level outcomes the initiative seeks to influence. Within the domains of economic development, housing, and workforce development, indicators have been selected with those outcomes in mind, even when the connection is indirect. This alignment provides a coherent basis for interpreting progress, recognizing that community-level conditions will always extend beyond the initiative’s immediate control.

2.2 Economic Development

The district’s approach to economic development recognizes that economic mobility depends not only on individual opportunity but also on the strength of the local economic environment—where businesses can start, grow, and reinvest. Revitalizing commercial

corridors, reducing vacancy, and strengthening the base of locally- and/or minority-owned enterprises are foundational to this goal. When neighborhood vitality and economic opportunity reinforce each other, they create the conditions in which residents can access quality jobs close to home and the economic benefits of growth circulate within the district.

The following community-level economic development indicators serve as reference points for understanding progress in economic development and for situating the district's nearer-term activities within the broader economic landscape.

- **# Net New Jobs**
 - Livable wage jobs / High quality jobs
 - Jobs in target / opportunity industries
- **% Change in Commercial Vacancy**
- **% Change in Commercial / Industrial Assessed Value**

Progress in the district's economic development work will be tracked through the indicators outlined below in Table 2.1, which pairs each strategy with its corresponding contributing and leading indicators.

Table 2.1: Economic Development Evaluation Matrix

Strategy	Contributing Indicator	Leading Indicator
ED1. Economic Development Loan Fund	ED1.1: Loan information ED1.2: Loan performance	ED1(a): # Local hiring ED1(b): Local subcontracting ED1(c): # MBE firms accessing capital (% of borrowers) ED1(d): # Jobs created ED1(e): # Housing units created*
ED2. Incentives for Jobs Program	ED2.1: Outcomes of conditions tied to incentives granted (<i>e.g., # of local jobseekers receiving priority interviews</i>)	ED2(a): Vacant property reuse ED2(b): # Businesses attracted / retained ED2(c): # Jobs created / retained ED2(d): Employment milestones (hiring & longevity) among those hired
ED3. Marketing & Attracting Investment / IEDI Partnership	ED3.1: # Property owners/developers engaged ED3.2: # Businesses identified / connected to leasing opportunities	ED3(a): Vacant property reuse ED3(b): Growth in occupancy / # of small-footprint businesses
ED4. District Relationship Management / Economic Development Capacity Building	ED4.1: Referrals to Resources, Capital & Technical Assistance	ED4(a): May vary based on type of assistance

*Note: The Economic Development Loan Fund, as conceptualized, is intended to support economic activity that yields housing (re)development; as such, housing units created is included as an economic development metric, separate from those within the housing domain.

While most terms in the matrix above are generally understood, some terms are defined below to support consistent interpretation and reporting.

- **Loan information:** Number of loans, dollars loaned, average term, average interest rates;
- **Loan performance:** Delinquency rate, default rate;
- **Local hiring:** Employees of borrowers residing within district boundaries; additionally, if it is possible to assess the number of those engaged with a community center who become employed by borrowers, that would be tracked as well;
- **Local subcontracting:** Address of subcontractor(s) within the district;
- **Small-footprint businesses:** Public-facing businesses in commercial spaces less than 5,000 square feet.

2.3 Housing

The district's approach to housing focuses on expanding the supply of affordable, quality homes—both rental and ownership—and on helping residents access and maintain housing that provides stability and a foundation for long-term economic mobility. Its strategies also aim to improve the condition of existing housing and strengthen the ecosystem of community-based development organizations that deliver community development services. Additional strategies help residents connect to housing opportunities, reduce risks of eviction and homelessness, and maintain quality, stable housing situations. Together, these efforts aim to create a housing system that supports long-term stability, equitable opportunity, and the capacity for residents to build wealth over time.

The following community-level housing measures provide context for the district's housing strategies and indicate whether local conditions are moving toward greater stability and affordability.

- % Housing cost burdened (by tenure)
- % Change in evictions relative to Marion County
- # subsidized units
- #/% Housing units affordable to 80% AMI (area median income) household
- % Change in residential assessed value v. Marion County
- Residential stability among supported households
- Community-based development organization (CBDO) capacity for increased project volume/complexity

Progress in the district's housing initiatives will be assessed through the indicators outlined below in Table 2.2, which link each strategy to measurable activities and near-term outcomes that reflect housing stability and affordability goals.

Table 2.2: Housing Evaluation Matrix

Strategy	Contributing Indicator	Leading Indicator
H1: Predevelopment Grants	H1.1 #/\$ Predevelopment grants awarded & number of CBDOs supported	H1(a): #/% of predevelopment grants entering post-predevelopment development pipeline H1(b): #/% of predevelopment granted projects constructed and ready for occupancy H1(c): # affordable units created through predevelopment grants H1(d): For projects not progressing, what issue(s) prevented development?
H2: Home-ownership	Pending: New Markets Tax Credits allocation & development milestones <i>Included conditionally, pending award and final program structure.</i>	Pending: Units developed in accordance with New Markets Tax Credits requirements <i>Included conditionally, pending award and final program structure.</i>
H3: Owner-Occupied Repair	H3.1: # Projects & projects by type H3.2: # Projects in which multiple services are provided H3.3: \$ Deployed H3.4: Who couldn't be served and why?	H3(a): % engagements where intervention resolves all housing condition challenges H3(b): Overall housing condition after intervention H3(c): Residential stability among those supported H3(d): % of interventions in which local firms provide OOR H3(e): # OOR specialist jobs created at CBDOs
H4: Housing Navigation	H4.1: # Landlords engaged H4.2: # Successful housing placements (by community centers) H4.3: # Housing services referrals H4.4: # Services provided by coaches	<i>Among those supported...</i> H4(a): % experiencing eviction H4(b): % sufficiently housed H4(c): % retaining stable housing at 6/12 months
H5: Individual Development Accounts	H5.1: # IDAs accessed H5.2: #/% Meet emergency savings threshold H5.3: \$ Contributed / \$ Matched H5.4: % Fully capitalized (and timing) H5.5: #/\$ Disbursements	H5(a): # Homes purchased / renovated / repaired H5(b): # Businesses capitalized H5(c): # Education outcomes attained H5(d): Other qualified outcomes (if any)
H6: Housing Stability for School Success	H6.1 #/time to housing production milestones	<i>Outcomes tied to development timeline and construction schedule; project schedule may extend beyond grant period.</i>
H7: CBDO Capacity Building	H7.1: CBDOs advance individualized capacity-building priorities	H7(a): Change in organizational capacities relative to baseline self-assessment H7(b): Will vary based on activity but could include items such as: greater readiness to pursue new opportunities; being sought out as a partner in collaborations; more proactive and capable predevelopment work; external validation of capacity (e.g., new funding or partnerships)

While most terms in the matrix above are generally understood, some terms are defined below to support consistent interpretation and reporting.

- **New Markets Tax Credits (NMTC):** A federal financing mechanism that supports real estate investment in qualifying low-income census tracts by providing tax credits to private investors who supply capital to support development.

- **Development milestones:** Distinct, sequential stages in the housing development process that mark substantive progress toward project completion:
 - Conceptual: Project has been identified and an initial concept has been developed, including a prospective site, target population, and basic feasibility.
 - Predevelopment: Preliminary design, due diligence, and financial structuring are underway. Activities often include securing site control, completing environmental and market studies, preparing architectural or engineering plans, and pursuing zoning, permitting, or early funding commitments. Project is advancing toward financial closing and construction readiness.
 - Construction: All major financing has closed, permits are in place, and physical construction or rehabilitation has begun. This stage continues through substantial completion and final inspections.
 - Ready for Occupancy: Construction is complete and units are ready for leasing or sale.

2.4 Workforce Development

The district's approach to workforce development focuses on expanding access to quality employment by strengthening both the talent pipeline and the conditions that support sustained participation in the labor force. Efforts are directed toward equipping residents with the skills, credentials, and experiences needed for advancement while helping employers connect to local talent that can meet their workforce needs.

The district's strategies emphasize practical, relationship-based approaches to employment and training. These include engaging employers in shaping and offering paid training opportunities, providing financial supports that help residents overcome barriers to securing and maintaining employment, and enhancing outreach to connect residents to available opportunities. Together, these efforts seek to ensure that residents not only gain access to work, but also build the skills, stability, and confidence needed for long-term economic mobility.

The following community-level measures provide context for the district's workforce development strategies:

- % District residents employed relative to Marion County (among ages 16-64)
 - % District residents employed within district
 - Educational attainment levels within district
- Educational attainment is included as a community-level goal to reflect its importance to long-term mobility, recognizing that any observed changes would likely occur as indirect or second-order effects of progress in this or other domains.*

The district's progress in workforce development will be assessed through the indicators outlined in Table 2.3, which align each strategy with activities and short-term results that demonstrate how residents are gaining skills, accessing quality employment, and advancing toward sustained economic mobility. Compared with other domains, workforce indicators may rely more heavily on programmatic/partner-reported data.

Table 2.3: Workforce Development Evaluation Matrix

Strategy	Contributing Indicator	Leading Indicator
WD1: Industry-Recognized Certificates Programming	WD1.1: # of certificate programs / training opportunities offered WD1.2: # of participants enrolling in certificate programs	WD1(a): #/% of participants completing certificate programs (new skills and upskilling) WD1(b): Among participants / completers, #/% achieving employment milestones associated with program (hire / wage increase / promotion)
WD2: Training Stipends	WD2.1: #/\$ Stipends provided	WD2(a): #/% of supported participants achieving meaningful training milestone(s) WD2(b): #/% of those supported achieving employment milestones associated with training (hire / wage increase / promotion)
WD3: Barrier Busting Funds	WD3.1: #/\$ supports provided by type (transp., child care, housing, etc.) / individual	WD3(a): #/% of those supported achieving employment milestones (hire, 3-, 6-, and 12-month milestones)
WD4: Employer Champions Program	WD4.1: Engagement of 20+ employer champions WD4.2: # of job placements at engaged employers / network WD4.3: # of referrals to training	WD4(a) #/% of employer champions retained WD4(b): #/% completing training WD4(c): % employed at 3-, 6-, and 12-months WD4(d): Job placements with wages >=\$24/hr
WD5: Work Experience Learning (WEX)	WD5.1: # of WEX Sites (total & per industry) WD5.2: # participating in WEX training WD5.3: #/% completing training	WD5(a): % of training participants hired - % hired by WEX provider after training, % hired within industry after training WD5(b): [among above] % employed at 3-, 6-, and 12-months WD5(c): Continuation of WEX offerings at initial employer sites WD5(d): New WEX employers on-boarded WD5(e): Securing sustainable, ongoing funding for program
WD6: Workforce Coordination Team	WD6.1: <i>TBD indicators tied to retention outcome coaches, may vary by community center</i> WD6.2: <i>TBD indicators tied to Job Developer role</i>	WD6(a): <i>Final indicators TBD, pending job descriptions, but anticipate will be tied to improved employment outcomes relative to temporal or comparative benchmark(s).</i> WD6(b): <i>Final indicators TBD, pending job descriptions, but anticipate will be tied to expanding workforce opportunities for community center participants within the district</i>
WD7: Center for Working Families Capacity Building	WD7.1: Community centers advance individualized capacity-building priorities	WD7(a): Change in organizational capacities relative to baseline self-assessment WD7(b): Will vary based on activity but could include items such as: greater readiness to pursue new opportunities; being sought out as a partner in collaborations; more proactive and capable workforce development activities; external validation of capacity (e.g., new funding or partnerships)

While most terms in the matrix above are generally understood, some terms are defined below to support consistent interpretation and reporting.

- **Employer champion:** An employer who regularly and actively participates in the workforce initiatives of the district—or those of its partners—in ways that benefit the district’s residents. Examples of active participation include active participation in designing training; providing paid training, apprenticeship, or work-based learning opportunities in partnership with the district; guaranteeing interviews to IEMD residents and/or participants in IEMD training initiatives; implementing hiring, advancement, or retention practices aligned with the district’s workforce activities; or providing material or in-kind support for the district’s workforce programs.
- **WEX (work experience) provider:** An organization that delivers or manages paid work experience opportunities for residents, often in coordination with employers who host participants.
- **Barrier busting funds:** Direct monetary assistance provided to help residents overcome practical or logistical barriers to participating in employment or workforce development activities under the IEMD framework.
- **Stipends:** Direct monetary payments made to residents participating in workforce development activities as compensation for time spent in training, work experience, or other structured learning programs supported through the IEMD framework.

2.5 Synthesis and Application

Taken together, this framework establishes a coherent structure for understanding progress across the district’s three strategic domains—economic development, housing, and workforce development. By pairing long-term community goals with near-term indicators of activity and change, it provides a common language for partners to interpret results and situate their work within the broader vision of the IEMD.

While the framework is designed to be stable and practical for implementation, it may evolve as strategies mature, data systems strengthen, and collective learning deepens. Any refinements will be guided by the same principles that shaped this version: clarity, alignment with existing frameworks, and usefulness for shared learning and decision-making.

3. Monitoring & Performance Measurement Guide

The monitoring and performance measurement guide records the procedures, responsibilities, and technical choices that support the IEMD evaluation. Its purpose is to capture the practical side of the work—data sources, methods of collection, roles in managing information, and the assumptions and caveats that shape interpretation. By assembling these details in one place, the guide provides a durable reference for how evaluation is carried out over the course of the initiative.

The framework in Section 2 outlines what is being measured and why those measures matter. This section carries that forward by documenting the mechanics of measurement: the sources drawn upon, the methods of collection and management, and the roles assigned in carrying out those tasks. It also notes assumptions, caveats, and lessons that shape interpretation, so that the evaluation remains transparent and replicable over time.

3.1 Summary of Data Sources

The evaluation draws on several families of data, each with strengths and limitations. Together they provide a more complete picture than any individual source.

Baseline and contextual data provide consistent points of comparison across time and geography. These include public sources such as the American Community Survey (ACS) and the Longitudinal Employer-Household Dynamics (LEHD). These sources are valuable for their comparability and breadth, though they often lag in timeliness and may require careful interpretation at smaller geographies. When possible, these external data series will be benchmarked to Marion County (and possibly elsewhere) to contextualize change.

Programmatic and administrative records provide the most direct account of the initiative's work. These include workforce participation and job placements, housing development pipeline and compliance reporting, loans originated, capital leveraged, technical assistance delivered, and other activities. Together these sources create a structured basis for tracking activity across the initiative, with common definitions and reporting practices developed to ensure consistency across partners and, where needed, data-sharing agreements and access protocols to govern access and use for the purposes of evaluation.

Other compilations: In cases where activities are not yet captured through an established reporting system, partners will have access to purpose-built forms or other recording mechanisms to document work for evaluation purposes. Activities that may require these mechanisms include those that are new, evolving, and/or not yet standardized, such as incentive-related economic development commitments, housing navigator engagements with landlords, or employer roundtables convened by the centers. While less standardized than

administrative records, these compilations help ensure the evaluation accounts for elements of the initiative that would otherwise go undocumented.

The tables on the pages that follow summarize anticipated data sources and the indicators they support. For each, it identifies the domain of work, lists the likely source of that data, and notes any assumptions or requirements needed to make it usable for evaluation. This structure provides clarity on both the origin of each measure and the steps required to ensure the data are reliable and consistent across the initiative.

List of Acronyms in Tables 3.1 – 3.3

- **ACS:** American Community Survey
- **AMI:** Area median income
- **CBDO:** Community-based development organization
- **CWF:** Center for Working Families
- **EDLF:** Economic Development Loan Fund
- **EDM:** Economic Development Manager
- **EMCC:** Edna Martin Christian Center
- **ETO:** Efforts-to-Outcomes
- **HSSS:** Housing Stability for School Success
- **IEDI:** Indy Economic Development
- **INHP:** Indianapolis Neighborhood Housing Partnership
- **JBNC:** John Boner Neighborhood Centers
- **LEHD:** Longitudinal Employer-Household Dynamics
- **OOR:** Owner-occupied repair
- **SECS:** Southeast Community Services
- **WEX:** Work experience | work experience learning

Table 3.1: Summary of Data Sources: Economic Development

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Community-Level Indicators					
# Net new jobs	External	LEHD	Annual	Evaluator	Jobs in LEHD at each update
# Livable wage jobs	External	LEHD	Annual	Evaluator	Jobs at or LEHD upper threshold (LEHD >= \$3,333/mo) as a proxy for living-wage jobs
# Jobs in target / select industries	External	LEHD	Annual	Evaluator	
% Change in commercial vacancy	External	Open Indy: Parcels w/ Owner Info	Annual	Evaluator	Approximation of vacancy: AV land is >60% of total AV.
% Change in commercial / industrial assessed value (improvements only)	External	Open Indy: Parcels w/ Owner Info	Annual	Evaluator	Will need to maintain historical data for comparisons across time.
Contributing Indicators					
Economic Development Loan Fund: ED1.1: Loan information	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	Loan records or summary of loan records
Economic Development Loan Fund: ED1.2: Loan Performance	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	Loan records or summary of loan records
Incentives for Jobs Program ED2.1: Outcomes of conditions tied to incentives granted	Programmatic	EDM	Quarterly	EDM	EDM record keeping CWF among those hired, presuming CWF participation
Marketing & Attracting Investment / IEDI Partnership ED3.1: # Property owners/developers engaged	Programmatic	EDM / IEDI	EDM / IEDI	EDM / IEDI	Subject to change pending final program design
Marketing & Attracting Investment / IEDI Partnership ED3.2: # Businesses identified / connected to opportunities	Programmatic	EDM / IEDI	EDM / IEDI	EDM / IEDI	Subject to change pending final program design
District Relationship Management / Economic Development Capacity Building ED4.1: Referrals to resources, capital & technical assistance	Programmatic	EDM / IEDI	EDM / IEDI	EDM / IEDI	Presumes EDM / IEDI record keeping

Table 3.1: Summary of Data Sources: Economic Development (continued)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Leading Indicators					
Economic Development Loan Fund ED1(a): # Local hiring	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	This will need to be incorporated into loan documentation. Will want to assess # of local subcontracts & percent of all contract/subcontracts.
Economic Development Loan Fund ED1(b): Local subcontracting	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	This will need to be incorporated into loan documentation. Will want to assess # of local subcontracts & percent of all contract/subcontracts.
Economic Development Loan Fund ED1(c): # MBE firms accessing capital (% of borrowers)	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	Loan records or summary of loan records; may need to be incorporated into loan documentation.
Economic Development Loan Fund ED1(d): # Jobs created	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	Loan records or summary of loan records; may need to be incorporated into loan documentation.
Economic Development Loan Fund ED1(e): # Housing units created	Programmatic	EDLF Administrator	Quarterly	EDLF Administrator	Loan records or summary of loan records; may need to be incorporated into loan documentation.
Incentives for Jobs Fund ED2(a): Vacant property reuse	Programmatic	EDM	Quarterly	EDM	Number and area to be included, along with narrative
Incentives for Jobs Fund ED2(b): # Businesses attracted / retained	Programmatic	EDM	Quarterly	EDM	Should include narrative description, especially when retention is claimed
Incentives for Jobs Fund ED2(c): # Jobs created / retained	Programmatic	EDM	Quarterly	EDM	Should include narrative description, especially when retention is claimed
Incentives for Jobs Fund ED2(d): Employment milestones (hiring & longevity) among those hired	Programmatic	ETO	Quarterly	EDM / Community Centers	Including but not limited to hiring, wages, promotions, and sustaining employment through 3-, 6-, and 12-month milestones.
Marketing & Attracting Investment / IEDI partnership ED3(a): Vacant property reuse	Programmatic	EDM / IEDI	Quarterly	EDM / IEDI	Subject to change pending final program design
Marketing & Attracting Investment / IEDI partnership ED3(b): Growth in occupancy / # of small-footprint businesses	Programmatic	EDM / IEDI	Quarterly	EDM / IEDI	Subject to change pending final program design
District Relationship Management / Economic Development Capacity Building ED4(a): Indicators will vary based on type(s) of assistance provided	Programmatic	EDM / IEDI	Quarterly	EDM / IEDI	Narrative description, with quantitative information included as relevant

Table 3.2: Summary of Data Sources: Housing

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Community-Level Indicators					
% Housing cost burdened (by tenure)	External	ACS	Annual	Evaluator	Pull ACS data annually when 5-year updates become available.
% Change in evictions relative to Marion County	External	Eviction Lab	Annual	Evaluator	Assumes continued public availability of Eviction Lab Data
# Subsidized units	External	National Housing Preservation Database	Annual	Evaluator	If property-level data are accessed by a consultant, data license may be required.
#/% Housing units affordable to 80% AMI household	External	National Housing Preservation Database	Annual	Evaluator	Affordability is calculated using US Dept of Housing and Urban Development Income limits and assumes a maximum housing cost of 30% household income, including rents or estimated mortgage payments given interest rates, down payments, PMI (private mortgage insurance), a property tax and homeowner's insurance.
% Change in residential assessed value v. Marion County	External	Analysis of ACS data	Annual	Evaluator	Will need to maintain historical data for comparisons across time.
Residential stability among supported households	Programmatic	Post-Engagement Survey	Annual	Evaluator	To the degree possible, when contact information among those supported is available. Will use or adapt Arizona Self-Sufficiency Matrix questions.
CBDO capacity for increased project volume/complexity	Programmatic	Synthesis of CBDO documentation, activity, and district-engagements	Annual	Evaluator	Combination of CBDO submitted reflections and narrative insights regarding the ways in which CBDOs evolve with respect to organizational capacity based on observable indicators such as number and scale of active projects, ability to secure new financing or partnerships, and demonstrated readiness for predevelopment or construction activities.

Table 3.2: Summary of Data Sources: Housing (cont'd)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Contributing Indicators					
Predevelopment Grants H1.1: #/\$ Predevelopment grants awarded & number of CBDOs supported	Programmatic	Coordinating Committee	Semi-annual	Coordinating Committee	Combination of quantitative and brief narrative description/location of pre-development activities.
Homeownership: H2.1: New Markets Tax Credits allocation & development milestones	Programmatic	INHP	TBD	INHP	Presumes allocation of New Markets Tax Credits <i>Included conditionally, pending award and final program structure.</i>
Owner-Occupied Repair H3.1: # Projects (and by project type)	Programmatic	OOR administrator	Quarterly	JBNC	A form or database will be needed to support OOR programs; anticipate inclusion in database of record and/or grant reporting by OOR providers
Owner-Occupied Repair H3.2: # Projects w/multiple services provided	Programmatic	OOR administrator	Quarterly	JBNC	A form or database will be needed to support OOR programs; anticipate inclusion in database of record and/or grant reporting by OOR providers
Owner-Occupied Repair H3.3: \$ deployed	Programmatic	OOR administrator	Quarterly	JBNC	A form or database will be needed to support OOR programs; anticipate inclusion in database of record and/or grant reporting by OOR providers
Owner-Occupied Repair H3.4: # Who couldn't be served and why	Programmatic	OOR administrator	Quarterly	JBNC	A form or database will be needed to support OOR programs; anticipate inclusion in database of record and/or grant reporting by OOR providers
Housing Navigation H4.1: # landlords engaged	Programmatic	Housing Navigator	Quarterly	Housing Navigator	This likely needs to be tracked within the metrics for the housing navigator position.
Housing Navigation H4.2: Successful housing placements (by community center staff)	Programmatic	Database of Record ETO	Quarterly	Community Centers	Inclusion in database of record infrastructure and/or ETO
Housing Navigation H4.3: # Housing services referrals	Programmatic	Database of Record ETO	Quarterly	Community Centers	Inclusion in database of record infrastructure and/or ETO
Housing Navigation H4.4: # Services provided by coaches	Programmatic	Database of Record ETO	Quarterly	Community Centers	Inclusion in database of record infrastructure and/or ETO
Individual Development Accounts H5.1: #IDAs accessed	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5.2: #/% meeting emergency savings threshold	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5.3: \$ contributed / \$ matched	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure

Table 3.2: Summary of Data Sources: Housing (cont'd)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Contributing Indicators (cont'd)					
Individual Development Accounts H5.4: % fully capitalized (and time to full capitalization)	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5.5: #/\$/Category of account distributions	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Housing Stability for School Success H6.1: #/time to housing production milestones	Programmatic	EMCC	Quarterly	EMCC	See Section 2 for definition of relevant housing production milestones.
CBDO Capacity Building H7.1: CBDOs advance individualized capacity-building priorities	Programmatic	CBDOs	Semi-annual	CBDOs	Combination of CBDO submitted reflections and narrative insights regarding the ways in which CBDOs evolve with respect to organizational capacity based on observable indicators such as number and scale of active projects, ability to secure new financing or partnerships, and demonstrated readiness for predevelopment or construction activities.
Leading Indicators					
Predevelopment Grants H1(a): #/% of predevelopment grants entering post-predevelopment development pipeline	Programmatic	Grant reporting	Quarterly	CBDO grant recipients	Combination of quantitative and brief narrative description/location of pre-development activities.
Predevelopment Grants H1(b): #/% of predevelopment granted projects constructed and ready for occupancy	Programmatic	Grant reporting	Quarterly	CBDO grant recipients	Combination of quantitative and brief narrative status update of project activities
Predevelopment Grants H1(c): # affordable units created through predevelopment grants	Programmatic	Grant reporting	Quarterly	CBDO grant recipients	Combination of quantitative and brief narrative status update of project activities
Predevelopment Grants H1(d): For projects not progressing, what issue(s) prevented development?	Programmatic	Grant reporting	Quarterly	CBDO grant recipients	Narrative grant reporting
Homeownership H2: New Markets Tax Credits reporting milestones & unit production pipeline	Programmatic	INHP	TBD	INHP	Presumes allocation of New Markets Tax Credits <i>Included conditionally, pending award and final program structure.</i>

Table 3.2: Summary of Data Sources: Housing (cont'd)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Leading Indicators (cont'd)					
Owner-Occupied Repair H3(a): % engagements where intervention resolves all housing condition challenges	Programmatic	OOR administrator	Quarterly	OOR administrator	Presumes a form will be created requesting limited information on individual engagements
Owner-Occupied Repair H3(b): Measure of overall housing condition following intervention	Programmatic	OOR administrator	Quarterly	OOR administrator	Presumes a form will be created requesting limited information on individual engagements; housing conditions to be defined in partnership with OOR administrator
Owner-Occupied Repair H3(c): Residential stability among those supported (at 6- and 12-months)	Programmatic	Survey	Quarterly	Evaluator	Presumes a form will be created requesting limited information on individual engagements
Owner-Occupied Repair H3(d): % of interventions in which local firms provide OOR	Programmatic	OOR administrator	Quarterly	OOR administrator	Presumes a form will be created requesting limited information on individual engagements
Owner-Occupied Repair H3(e): # OOR specialist jobs created at CBDOs	Programmatic	Grant Reporting	Annual	CBDOs	Narrative grant reporting
Housing Navigation H4(a): % experiencing eviction (among those supported)	Programmatic	Community Center Survey	Quarterly	Community Center Evaluator	Survey/check-ins at 6- and 12 months following engagement.
Housing Navigation H4(b): % sufficiently housed (among those supported)	Programmatic	Community Center Survey	Quarterly	Community Center Evaluator	Immediately following engagement.
Housing Navigation H4(c): % retaining stable housing at 6- and 12-months (among those supported)	Programmatic	Survey	Quarterly	Community Centers	Survey/check-ins at 6- and 12 months following engagement.
Individual Development Accounts H5(a): # Homes purchased / renovated / repaired	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5(b): # Businesses capitalized	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5(c): # Education outcomes attained	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure
Individual Development Accounts H5(d): Other qualified outcomes (if any)	Programmatic	Database of Record	Quarterly	JBNC	Inclusion in database of record infrastructure

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Leading Indicators (cont'd)					
Housing Stability for School Success H6: HSSS units ready for occupancy and/or being constructed on schedule.	Programmatic	EMCC	Quarterly	EMCC	Tied to development timeline and construction schedule; project schedule may extend beyond grant period.
CBD0 Capacity Building H7(a): Change in organizational capacities relative to baseline assessments and/or documentation of need in grant request.	Programmatic	CBD0s	Semi-annual	CBD0s	Presumes CBD0 baseline assessments, reflections, and/or requests for capacity building grants and reporting on those grants are available for comparison and that limited versions of those assessments are able to be used at annual intervals.
CBD0 Capacity Building H7(b): Will vary based on activity but could include items such as: Greater readiness to pursue new opportunities; being sought out as a partner in collaborations; more proactive and capable predevelopment work; external validation of capacity (e.g., new funding or partnerships)	Programmatic	CBD0s	Annual	CBD0s	Presumes CBD0s are able/willing to provide narrative updates on their evolutions as an organization and/or that there is an external party providing support who is able to provide these insights. In some cases – external validation, additional production, more sophisticated projects – may be readily evident from activity.

Table 3.3: Summary of Data Sources: Workforce Development

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Community-Level Indicators					
% District residents employed relative to Marion Co. (among ages 16-64)	External	ACS	Annual	Evaluator	ACS: B23001
% of employed district residents employed within district	External	LEHD	Annual	Evaluator	OnTheMap: Inflow/Outflow tool LEHD/LED Extraction Tool
Educational attainment levels within district	External	ACS	Annual	Evaluator	ACS: B15003
Contributing Indicators					
Industry Recognized Certificates Programming WD1.1: # of certificate programs / training opportunities offered	Programmatic	Workforce Administrator	Quarterly	Workforce Administrator	EmployIndy Workforce Administrator record keeping
Industry Recognized Certificates Programming WD1.2: # of participants enrolling in certificate programs	Programmatic	ETO	Quarterly	Workforce Administrator	Presumes participants in training will be captured in ETO and/or similar database for tracking outcomes
Training Stipends WD2.1: #/\$ Stipends provided	Programmatic	ETO	Quarterly	Workforce Administrator	Presumes stipends will be captured in ETO and/or similar database for tracking outcomes
Barrier Busting Funds WD3.1: #/\$ supports provided by type (transp., child care, housing, etc.) / individual	Programmatic	ETO	Quarterly	Workforce Administrator	Presumes fund distribution will be captured in ETO and/or similar database for tracking outcomes
Employer Champions Program WD4.1: Engagement of 20+ employer champions	Programmatic	Workforce Administrator	Semi-annual	Workforce Administrator	EmployIndy Workforce Administrator record keeping
Employer Champions Program WD4.2: # job placements at engaged employers / employer network	Programmatic	ETO Workforce Administrator	Quarterly	Community Centers	Presumes ETO can be used to report on those receiving services at Centers. If implementation would include opportunities for those from district that are not otherwise in Center-based programming, those may need to be tracked outside ETO.
Employer Champions Program WD4.3: # of referrals to job training provided by employer champions	Programmatic	Workforce Administrator	Semi-annual	Workforce Administrator	EmployIndy Workforce Administrator record keeping
Work Experience Learning WD5.1: # of WEX Sites (total & by industry)	Programmatic	Workforce Administrator	Quarterly	Workforce Administrator	EmployIndy Workforce Administrator record keeping

Table 3.3: Summary of Data Sources: Workforce Development (cont'd)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Contributing Indicators (cont'd)					
Work Experience Learning WD5.2: # participating in WEX training	Programmatic	ETO Workforce Administrator	Quarterly	Community Centers Workforce Administrator	Presumes ETO can be used to report on those receiving services at Centers. If implementation would include opportunities for those from district that are not otherwise in Center-based programming, those may need to be tracked outside ETO.
Work Experience Learning WD5.3: # / % completing training	Programmatic	ETO Workforce Administrator	Quarterly	Community Centers Workforce Administrator	Presumes ETO can be used to report on those receiving services at Centers. If implementation would include opportunities for those from district that are not otherwise in Center-based programming, those may need to be tracked outside ETO.
Workforce Coordination Team WD6.1: Job Retention Coach activities	Programmatic	Grant Reporting	Quarterly	Community Centers Workforce Administrator	<i>TBD indicators tied to retention outcome coaches, may vary by community center</i>
Workforce Coordination Team WD6.2: Job Developer activities	Programmatic	Grant Reporting	Quarterly	Community Centers Workforce Administrator	<i>TBD indicators tied to Job Developer role</i>
Center for Working Families Capacity Building WD7.1: Community Centers advance individualized capacity-building priorities	Programmatic	Community Centers	Semi-annual	Community Centers	Combination of submitted reflections and narrative insights regarding the ways in which centers evolve with respect to organizational capacity based on observable indicators such as number and scale of activities.
Leading Indicators					
Industry Recognized Certificates Programming WD1(a): #/% of participants completing certificate programs (new skills and upskilling)	Programmatic	Workforce Administrator	Quarterly	Community Centers Workforce Administrator	Presumes participants in training will be captured in ETO and/or similar database for tracking outcomes
Industry Recognized Certificates Programming WD1(b): Among participants / completers, #/% achieving employment milestones associated with program (hire / wage increase / promotion)	Programmatic	ETO	Quarterly	Community Centers Workforce Administrator	Presumes participants in training will be captured in ETO and/or similar database for tracking outcomes

Table 3.3: Summary of Data Sources: Workforce Development (cont'd)

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Leading indicators (cont'd)					
Training Stipends WD2(a): #/% of supported participants achieving meaningful training milestone(s)	Programmatic	Workforce Administrator	Quarterly	Community Centers Workforce Administrator	Presumes stipends, training and employment milestones of those receiving support will be captured in ETO and/or similar database for tracking activities and outcomes
Training Stipends WD2(b): #/% of those supported achieving employment milestones associated with training (hire / wage increase / promotion)	Programmatic	ETO	Quarterly	Community Centers Workforce Administrator	Presumes stipends, training and employment milestones of those receiving support will be captured in ETO and/or similar database for tracking activities and outcomes
Barrier Busting Funds WD3(a): #/% of those supported achieving employment milestones (hire, 3-, 6-, and 12-month milestones)	Programmatic	ETO	Quarterly	Community Centers Workforce Administrator	Presumes support, training and employment milestones of those receiving support will be captured in ETO and/or similar database for tracking activities and outcomes
Employer Champions Program WD4(a): #/% of employer champions retained	Programmatic	Workforce Administrator	Semi-annual	Workforce Administrator	Compared with the contributing indicator, this is measure of retention – how many employers see value in remaining engaged.
Employer Champions Program WD4(b): #/% participants completing training	Programmatic	ETO Workforce Administrator	Quarterly	Community Centers Workforce Administrator	Compared with the contributing indicator; this is a measure of completion.
Employer Champions Program WD4(c): % employed at 3-, 6-, and 12-months from hire date	Programmatic	ETO	Quarterly	Community Centers	Presumes this is available in ETO, beyond the initial placement and temporal thresholds are relevant/captured.
Employer Champions Program WD4(d): Job placements/hires with wages >=\$24/hr.	Programmatic	ETO	Quarterly	Community Centers	Presumes this is available in ETO and that this wage is the relevant marker.
Work Experience Learning WD5(a): % of training participants hired. <i>% hired by WEX provider after training & % hired within industry after training</i>	Programmatic	ETO	Quarterly	Community Centers	Presumes this is available in ETO for all participants
Work Experience Learning WD5(b): [among above] % employed at 3-, 6-, and 12-months from hire date	Programmatic	ETO	Quarterly	Community Centers	Presumes this is available in ETO, beyond the initial placement and temporal thresholds are relevant/captured.

Measure	Category	Data Source	Frequency	Responsible Party	Data Requirements
Leading indicators (cont'd)					
Work Experience Learning WD5(c): Continuation of WEX offerings at initial employer sites	Programmatic	Workforce Administrator	Semi-annual	Workforce Administrator	Compared with the contributing indicator, this is measure of retention – how many providers see value in remaining engaged.
Work Experience Learning WD5(d): New WEX employers on-boarded	Programmatic	Workforce Administrator	Semi-annual	Workforce Administrator	Listed as a leading indicator as it demonstrates success of initial efforts and ability to grow the program beyond initial recruitment efforts.
Work Experience Learning WD5(e): Securing sustainable, ongoing funding for program	Programmatic	Grant Reporting	Semi-annual	Community Centers / Coordinating Committee	
Workforce Coordination Team WD6(a): Final indicators TBD, pending job descriptions, but anticipate will be tied to improved employment outcomes relative to temporal or comparative benchmark(s).	Programmatic	Grant Reporting	Quarterly	Community Centers	
Workforce Coordination Team WD6(b): Final indicators TBD, pending job descriptions, but anticipate will be tied to expanding workforce opportunities for community center participants within the district	Programmatic	Grant Reporting	Quarterly	Community Center at which Job Developer is housed	
Center for Working Families Capacity Building WD7(a): Change in organizational capacities relative to baseline self-assessment	Programmatic	Grant Reporting	Semi-annual	Community Centers	Presumes baseline assessments, reflections, and/or requests for capacity building grants and reporting on those grants are available for comparison and that limited versions of those assessments are able to be used at annual intervals.
Center for Working Families Capacity Building WD7(b): Will vary based on activity	Programmatic	Grant Reporting	Semi-annual	Community Centers	Presumes narrative updates on organizational evolution.

3.2 Means and Methods of Data Collection

With a goal of establishing a practical and consistent data management strategy, IEMD evaluation efforts emphasize clarity, alignment, and usability in data collection. The breadth of the initiative inevitably brings complexity. With many distinct efforts operating under a shared framework, the challenge is less about reducing the number of measures than about making them intuitive and usable for those working within each domain.

Evaluation across each domain relies on a mix of existing public data, administrative systems, and new reporting tools designed to capture activities specific to the IEMD. Although these systems vary in structure and maturity, data will be collected and reported according to common definitions and standardized templates that ease reporting, aggregation, and analysis.

Collection Instruments. Data will be drawn from a mix of existing systems (e.g., ETO) and evaluation-specific tools/instruments (standardized forms/templates). Partners responsible for originating information will record it using shared forms, portals, or spreadsheets developed in partnership with the evaluator. Existing systems—such as databases for lending records, ETO, and/or public datasets including LEHD, ACS, and the National Housing Preservation Database—will be used wherever feasible.

For activities not already captured in a partner’s operational system, partners will document information through tracking sheets and provide standardized summaries using tools designed for that purpose. At a minimum, Formstack or SurveyMonkey forms will be developed to capture efforts; to the degree that more robust systems become available through newly deployed IEMD capacities (e.g., a deployment of a new database of record), data collection mechanisms will be built within those environments whenever possible.

When new instruments are designed for IEMD reporting, templates will specify defined variables, units of measure, and include brief descriptions as necessary. The evaluation team will conduct periodic reviews to confirm internal consistency, cross-check values that appear anomalous, and verify that partners apply definitions uniformly. Any adjustments to forms or reporting processes will be documented so that results remain traceable over time. The evaluation implementation plan anticipates additional effort in Year 1 of the evaluation to support the creation, testing, and deployment of these instruments (see Table 3.6).

Cadence of Reporting. Anticipated collection intervals are specified within the tables in **Section 3.1: Summary of Data Sources** and correspond to the practical rhythms of each data source. Programmatic and administrative data are generally anticipated to be reported quarterly, balancing timeliness with staff capacity. Some items—such as employer engagement or capacity-building—will be reviewed semi-annually or annually to reflect the pace of organizational change. External datasets will be updated as released, usually on an annual cycle.

This cadence allows each partner to work within its normal reporting patterns while ensuring the evaluation receives a steady flow of information suitable for analysis. Upon implementation, this cadence will be maintained within a calendar posted to the IEMD SharePoint, and include deadlines to support timely reporting for funder reports, external communications, and strategic guidance as needed.

Geographic/Programmatic Inclusion Criteria. Geographic-based reporting will align with the formally defined boundaries of the IndyEast Economic Mobility District—Raymond Street to the south, Emerson Avenue to the east, 30th Street to the north, and the I-65/Monon Trail corridor to the west. These boundaries will serve as the reference geography for census-tract-level data and for any point-level information aggregated to the tract or district level. A list of census tracts corresponding to the district is provided in *Table 3.4*.

Table 3.4. List of IEMD Census Tracts

IEMD Census Tracts (18097)	
3519	3550
3521	3551
3523	3553
3524	3554
3525	3555
3526	3556
3527	3557
3528	3559
3544	3571
3545	3572
3547	3573
3548	3574
3549	

For administrative or partner-reported data, inclusion within the IEMD may be determined by IEMD leadership rather than through geographic assignment alone. Within the IEMD evaluation effort, partners are expected to report only those activities and records that are part of IEMD-supported efforts—typically those funded directly through the initiative or clearly aligned with its strategies.

In short, monitoring changes in community-level indicators will be, by necessity, bounded by census geographies, while contributing and leading indicators will be based on explicit programmatic connections to IEMD efforts.

Special Cases. Some activities may produce data that do not fit existing categories or collection instruments. While specific data collection processes and procedures will be defined for these instances as needed, it is anticipated that these efforts will be logged through concise narratives summarizing scope, participants, and outcomes. Over time, activities that were not anticipated at the onset of the district, but that become recurring, will migrate into standardized reporting templates as their structure stabilizes.

Data systems and practices may evolve across the implementation period, but the principles of consistency, transparency, and shared definitions will remain constant. Any refinements to reporting tools or methods will be documented and managed through the processes described in **Section 3.8 Change Management**.

3.3 Roles & Responsibilities

The execution of the evaluation activities outlined within this plan requires clarity of roles to ensure accountability, efficiency, and coherence across partners. This section outlines the

governance hierarchy, delineates responsibilities by function, and anticipates how responsibilities may adapt under different staffing scenarios.

Governance Hierarchy

- **Coordinating Committee:** Provides direction on evaluation priorities, methodological choices, and substantive changes. Serves as a central audience for evaluation outputs, which can inform collective strategic and programmatic decisions, particularly as context evolves.
- **District Director:** Holds authority for day-to-day implementation of the initiative and ensures evaluation activities align with broader initiative priorities. Works closely with the evaluator to integrate findings into ongoing management and strategy.
- **Evaluator:** External but strategically embedded within the initiative, accountable for methodological integrity, analysis, and synthesis. Leads on design, data quality standards, and interpretation, while collaborating with the Director and reporting progress/findings to the Committee. The Evaluator's firm will also lead any qualitative and/or process-related data collection as well.
- **Evaluation Support Staff (if available):** Executes task-level responsibilities (reminders, logs, QA/QC, documentation) at the behest of the evaluator, while formally supervised by the Director.
- **Staff across Partner Organizations:** Handle initial data entry, particularly related to administrative and partner-reported data. These roles are essential for ensuring accuracy and timeliness of records, though the precise configuration across partners is not yet fixed. It is anticipated that these organizations will enter into memoranda of understanding with the district that provide a framework for the role of staff at these organizations in data transfers and supporting the evaluation.
- **Partner Data Leads (as applicable):** Where data systems are housed externally (e.g., by a funder or partner organization), cooperation may be required for access and integration. These roles are not internal to the initiative but function as critical contributors to the evaluation.

Table 3.5 maps general responsibilities across evaluation functions. It shows how design, execution, oversight, and use of evaluation activities align to each role, providing a functional view of the division of labor.

Table 3.5: Evaluation Roles & Responsibilities

Function	Evaluator	Support Staff	Director	Partner Org. Staff	Committee
Data Collection	Designs protocols; ensures definitions / consistency; develops and tests tools / infrastructure.	Executes reminders, maintains logs, conducts QA, assists in testing / refining new processes.	Ensures compliance and resolves issues requiring authority.	Enters and corrects administrative / partner data at point of origin.	—
Data Processing & Management	Develops scripts / methods, validates outputs, finalizes data for reporting.	Documents procedures, runs test scripts, compiles preliminary reports.	Confirms alignment with initiative reporting obligations.	Supports corrections and record management at partner level.	—
Interpretation & Reporting	Produces narrative analysis, contextual insights, strategic framing.	Assists with tables, slide decks, administrative summaries.	Reviews and integrates deliverables into broader communications.	Provides administrative summaries as available.	Offers input on framing, priorities, and use of findings.
Continuous Improvement	Identifies lessons and feedback loops.	Documents decisions and practices.	Decides on actions in consultation with evaluator / Committee.	—	Reviews and determines collective actions based on findings.

Contingencies and Adaptation

Staffing arrangements will influence how responsibilities are carried out. If support staff are not present, the evaluator will assume the bulk of task-level responsibilities related to data collection and processing, and the Director would need to take on a more active role in ensuring partner compliance with reporting. If staff are present, they will shoulder the operational burden, allowing the evaluator to focus more on analysis, synthesis, and interpretation. Regardless of staffing configuration, the evaluator will ensure that data and analysis are sound enough to support decision-making in context, or will identify where available information is insufficient to do so, while the Director will supervise any initiative-employed staff and ensures their work aligns with initiative priorities.

Over time, staff may assume additional responsibilities as they gain experience. With continuity, they can take on tasks such as generating standard reports, troubleshooting issues, or preparing preliminary analyses. These adaptations would depend less on the initiative itself than on staff tenure and development, and should be treated as a potential area of growth rather than an expectation at the outset.

3.4 Interpretation and Use

Evaluation within the IEMD is intended to provide timely information that partners can use to understand progress, make adjustments, and communicate results. Rather than treating evaluation as a standalone exercise, evaluation is integrated into the regular rhythms of decision-making and reflection that guide the initiative.

Findings will be interpreted and shared through a structured cycle of reporting and discussion:

- **Semi-annual cycles** will provide the foundation for reporting to the funder. The evaluator will compile and synthesize administrative and partner-reported data into concise tables, charts, and narrative summaries, coordinating closely with initiative staff to ensure alignment with funder requirements and submission schedules.
- **Annual syntheses** will integrate information across domains—economic development, housing, and workforce development—to provide initiative leadership with a consolidated view of progress, trends, and emerging lessons. These syntheses will be led by the evaluator and presented for discussion with the District Director, Coordinating Committee, and other decision-makers.
- **Public-facing communications** may be developed by the initiative’s communications partners, with the evaluator supporting these efforts by providing data, interpretation, and other analytical content that can be adapted for broader audiences.
- **Midpoint and final evaluations** will synthesize multiple data streams, integrating process insights, contextual indicators, and quantitative measures to assess progress over time. The midpoint evaluation will focus on implementation fidelity and early outcomes; the final evaluation will summarize results and lessons learned for replication or adaptation elsewhere.

This reporting cadence provides discipline and predictability—ensuring findings are reviewed regularly, discussed collaboratively, and applied in ways that strengthen implementation. At the same time, the schedule remains flexible enough to accommodate new questions or emerging priorities as the initiative evolves.

Through this approach, evaluation becomes an active part of management and learning—a means of translating ongoing experience into evidence, and evidence into shared understanding of how the district’s efforts are contributing to economic mobility and opportunity. In doing so, it provides partners with the insight needed to refine implementation, pursue new opportunities, and strengthen strategies over time, ensuring that reflection leads to understanding and informs decision-making. Findings from these review cycles may also inform refinements to indicators or processes, following the procedures in [Section 3.8 \(Change Management\)](#).

3.5 Evaluation Timeline and Key Milestones

The multi-year evaluation will unfold in phases aligned to major reporting and learning milestones. The table below summarizes anticipated focus areas and products by year. Table 3.6 provides a high-level annual overview of primary evaluation activities throughout the initiative.

Table 3.6: Annual Evaluation Focus and Key Deliverables.

Year	Primary Focus	Key Activities / Deliverables
Year 1 / Startup (2026)	System Development and Launch Support	Implement reporting systems and routines outlined in the evaluation plan; establish data-sharing processes, submission calendars, and templates; test data flows and troubleshoot startup challenges; produce initial reporting content for funder and coordinating committee.
Year 2 (2027)	Routine Data Collection and Reporting	Maintain data definitions and reporting cadence; provide semi-annual analyses; update instruments as needed; prepare materials that support ongoing reflection and course corrections.
Year 3 (2028)	Midpoint Evaluation and Synthesis	Conduct structured review across domains; integrate administrative and partner data; incorporate contextual benchmarking and qualitative insights; prepare midpoint evaluation report summarizing progress, lessons, and potential adjustments.
Year 4 (2029)	Continued Monitoring and Learning	Sustain quarterly/annual reporting and partner learning cycles; provide interim analyses or targeted deep dives as requested by coordinating committee; support preparation of communications content.
Year 5 (2030)	Final Evaluation and Knowledge Transfer	Deliver comprehensive synthesis of outcomes, trends, and lessons learned; integrate process and results data; contribute to final funder reporting; prepare materials to inform replication and long-term learning.

Years shown are illustrative only; implementation would begin when the work starts and proceed on an annual basis.

3.6 Caveats, Known-Unknowns, and What Ifs

Every evaluation faces practical limits, and acknowledging those limits helps ensure results are interpreted appropriately. Results associated with IEMD outcomes should be interpreted with an awareness of the limits of available data and the initiative’s broader operational context. Building upon the implementation considerations outlined in [Section 1](#), this section summarizes the main constraints and uncertainties that may impact how IEMD data are analyzed and understood. The intent here is not to diminish the value of findings, but to make their basis and boundaries explicit so that interpretation remains grounded and credible.

Known Limitations. Several structural realities will shape what can be measured and when. Public datasets—such as the ACS and LEHD—are subject to time lags of at least a year. Further, because ACS estimates are based on multi-year averages, small annual changes should be interpreted cautiously, particularly when drawing comparisons across a limited number of census tracts. Margins of error are relatively high for small geographies, meaning that apparent year-to-year fluctuations may reflect sampling variation rather than real change.

At the partner level, variation in reporting practices, system maturity, and data completeness may also influence what can be analyzed in a given period. Some indicators—especially those

involving smaller sample sizes or newer programs—may be better understood as providing directional insight rather than statistical rigor.

Unknowns and External Factors. The initiative also operates within a dynamic environment where external forces can shape outcomes in ways beyond the district’s control. The community-level goals for each domain recognize this reality, reflecting the conditions the district seeks to influence without suggesting that—even if successful—the initiative alone could meaningfully alter those broader forces.

Compared with the community goals, the initiative’s leading and contributing indicators are more directly tied to the district’s activities than to the broader community change it hopes to achieve; nevertheless, policy or funding shifts, changes in leadership among key partners, market fluctuations, and broader economic cycles may all influence results.

Adjustments in data systems or reporting practices—whether from public agencies, administrative partners, or funders—could affect the continuity of specific indicators. Where such changes occur, they will be documented, and results will be interpreted with those contextual factors in mind.

Contingency and Adaptation Protocols. To maintain interpretive integrity, the evaluation will periodically revisit key indicators to assess their ongoing relevance, feasibility, and consistency. When data gaps, methodological changes, or unexpected inconsistencies emerge, these will be flagged and discussed with IEMD leadership to determine whether to revise, replace, or supplement affected measures. Underlying assumptions about data sources, definitions, and interpretation will be documented to preserve transparency and traceability across the evaluation period.

Interpretive Guidance. Findings should be read with caution, particularly for short-term or small-area changes. Annual or quarterly results should be viewed as directional rather than definitive, recognizing that longer-term patterns provide a more reliable signal of progress. Observed trends should be interpreted as evidence of contribution, not proof of causation. Rather than attempt to definitively attribute impact, the appropriate test is whether the patterns observed are consistent with the district’s strategies and theory of change.

Together, the cautions above underscore that the evaluation’s purpose is to illuminate plausible contribution, not to claim control. Transparency about limitations—paired with disciplined documentation of methods and assumptions—helps ensure that findings remain useful for decision-making while preserving the integrity of interpretation.

3.7 Succession Planning

Continuity in evaluation practice depends on preserving institutional knowledge and maintaining access to key materials as personnel and contractors change over the initiative’s

multi-year horizon. The aim is to safeguard interpretive consistency—not to impose rigid administrative procedures—so that future staff can understand how evaluation findings were generated and apply lessons without restarting from scratch.

Documentation and Repository. The IEMD SharePoint site will serve as the central repository for evaluation materials. It will house non-identifiable content such as templates, data dictionaries, reporting tools, summary tables, and prior reports. Partner-held administrative data may remain with those partners, but aggregate or de-identified summaries submitted for evaluation will be retained.

Separately, the evaluator and District Director will jointly ensure that the repository contains documentation necessary to reproduce analyses and understand data provenance, without storing personally identifiable or otherwise sensitive information.

Leadership Transitions. Changes in key leadership roles—such as the District Director, evaluator, or executive leadership of the Centers or partner organizations—have the ability to affect evaluation continuity. Formal transitions will follow each entity’s respective succession policies, which are outside the scope of this plan. Within the context of IEMD evaluation, the intent is to preserve evaluation integrity by maintaining access to shared documentation, systems, and interpretive records.

In the event of a leadership transition, continuity will rely on documentation and redundancy rather than on any single individual. Key evaluation files, reporting calendars, and analytic notes will be maintained in the IEMD SharePoint repository to ensure that new leaders can understand prior decisions and analytic choices. The District Director and evaluator will each maintain awareness of core evaluation systems—including data collection tools, reporting protocols, and pending deliverables—so that either can orient new personnel to the evaluation’s structure and current status. When possible, the Coordinating Committee may serve as a stabilizing reference point, helping reaffirm priorities, timelines, and expectations during periods of transition.

Knowledge Transfer (Other Transitions). With transitions, the depth of handoff expectations will vary by role:

- For staff directly involved in evaluation design, analysis, or data management, transitions should include concise written summaries of current tasks, pending issues, and access details, with a debrief whenever feasible.
- For staff in partner or implementation roles who contribute data but are not part of the leadership or evaluation teams, continuity may be maintained through standard documentation—such as completed reporting templates, guidance notes, and correspondence saved within SharePoint—rather than individual memos.

- Where staff are employed by outside partner entities, the evaluation and leadership team will emphasize continuity through the transition. In these cases, records already submitted for evaluation will be retained in SharePoint, and the District Director and evaluator will coordinate with the partner to support consistent ongoing reporting.

Onboarding. New personnel will be provided access to relevant folders, prior reports, and process documentation within SharePoint, as appropriate to their role and consistent with IEMD data-access protocols. The level of onboarding support will correspond to the person’s role and capacity—for example, a new analyst may need a structured walkthrough of scripts and data dictionaries, while a partner program lead may only need guidance on submission schedules and reporting expectations.

Continuity and Ongoing Access. To avoid single points of failure, the evaluator and District Director will maintain shared awareness of the tools and accounts used for data collection. For third-party platforms, continuity will be supported through documentation of instruments and protocols, but not necessarily shared credentials.

The evaluator and District Director will periodically confirm that essential accounts, credentials, and documentation remain current and accessible. This step is intended to ensure continuity of access—not to evaluate performance or compliance—and will be revisited as data systems and staffing structures mature.

3.8 Change Management

Over the course of a multi-year initiative, circumstances will change; strategic priorities may evolve, data systems may shift, and processes that once seemed workable may prove less efficient or sustainable. This section outlines how such changes will be managed to preserve consistency and transparency without creating unnecessary administrative burden. Adjustments will be made only when warranted by clear need or practicality, not for the sake of revision itself.

Triggers for Change. Revisions to the evaluation plan may be considered when material conditions or feasibility change in ways that affect how information is collected or used. This may include:

- Updates to IEMD strategies or goals that meaningfully alter what progress should be measured against;
- Changes in data systems, availability, or reporting structures that affect what can be accessed or compared; or
- Instances where an element of this plan is found to be unworkable, redundant, or inconsistent with the initiative’s operating reality.

Other adjustments may emerge in response to unanticipated developments—such as shifts in funding, policy, or partnership structures—but these will be reviewed and documented on a case-by-case basis.

Process for Revision. When a potential change arises, the evaluator will:

1. Document the rationale and scope of the proposed adjustment, identifying which element of the plan is affected and why.
2. Assess implications for data continuity, comparability, or partner workload.
3. Share proposed changes with the District Director for review.
 - *Minor refinements* (e.g., clarifying definitions, adjusting timelines, updating data sources for feasibility) may be made jointly between the evaluator and District Director, with notice to the Coordinating Committee in the next regular update.
 - *Substantive revisions* (e.g., adding or retiring indicators, modifying reporting expectations, or shifting evaluation focus) will be reviewed collectively with IEMD leadership before implementation.

Interpretive methods and analytic framing remain within the evaluator’s professional discretion, provided that substantive methodological shifts are described in reporting products or accompanying technical notes.

Version Control and Recordkeeping. The evaluator will maintain a running version log of the evaluation plan, instruments, and key decisions within the IEMD SharePoint repository. Each entry will include the date, nature of change, and parties concurring. A brief reflective summary will be added quarterly to capture small procedural or interpretive adjustments that may otherwise go undocumented.

Communication. When revisions alter reporting expectations or partner-facing procedures, the evaluator will notify affected parties and provide updated guidance or templates. Internal changes to analytic methods or reporting structures will be documented through standard reporting deliverables and technical notes, ensuring transparency without unnecessary disruption to partners.

3.9 Technical Policies & Standards

To maintain clarity, comparability, and appropriate privacy protections, the evaluation follows a set of simple technical policies that guide how information is presented and interpreted. These policies are meant to document consistent practice rather than to impose rigid rules.

American Community Survey (ACS) estimates. The evaluation will rely on ACS five-year estimates for most tract- and district-level reporting. These data provide the most reliable coverage for small geographies and will serve as the baseline for most community-level

indicators. Margins of error and related considerations will be discussed in context when relevant to interpretation.

Small-Number Reporting. When reporting draws on administrative or partner-reported data, the evaluation team will suppress or aggregate results where cell sizes are smaller than ten ($n < 10$). This practice helps prevent inadvertent identification of individuals and maintains the integrity of published results. Suppressed data will be noted in footnotes or with placeholder symbols in tables or charts.

Disaggregation. Where relevant and feasible, results may be disaggregated to illustrate variation across groups or sub-areas within the district. Because the focus of the evaluation is the district as a whole, disaggregation will be used selectively—typically when requested or when doing so meaningfully aids interpretation—without compromising confidentiality or the comparability of measures.

Inflation and Dollar-Value Reporting. Financial and wage indicators will generally be reported in nominal terms to preserve their connection to current-year conditions. The evaluation team may apply inflation adjustments using the *Consumer Price Index for All Urban Consumers* (CPI-U) when such indexing enhances interpretation or comparison over time. The basis for any adjustment will be clearly noted in accompanying materials.

Quality Assurance and Data Consistency. The evaluation team will conduct routine checks to ensure internal consistency, identify outliers or apparent data entry errors, and verify that measures remain aligned with agreed-upon definitions. These checks will be documented as part of regular analytic workflows rather than through a separate compliance process. Minor discrepancies will be resolved in consultation with data-providing partners to maintain accuracy and transparency.

Revisions and Version Tracking. When previously submitted information is corrected or updated, the evaluation team will incorporate those revisions into the next reporting cycle and note material changes in accompanying documentation. A version log will be maintained within the shared repository to track substantive adjustments to datasets, templates, or analytic methods.

Coordination and Oversight. All technical policies operate within the broader data governance structure described in this plan. Access, storage, and recordkeeping practices follow the same principles of transparency and shared responsibility outlined in [Section 3.7 \(Succession Planning\)](#) and [Section 3.8 \(Change Management\)](#).