IndyEast Economic Mobility District

A Coordinated System for Neighborhood Economic Mobility

Proposal Summary

The IndyEast Economic Mobility District (IEMD) is a place-based strategy designed to create lasting economic mobility for families on the Eastside of Indianapolis. Rather than operating as separate housing, workforce, and economic development programs, IEMD aligns these investments into one coordinated system. Families do not experience their lives in silos, and therefore solutions cannot operate in silos. Stable housing, access to good jobs, and a thriving local economy must advance together.

This comprehensive, coordinated approach represents the natural progression of intentional collaboration among three community anchor institutions committed to addressing pervasive challenges in a holistic manner. Through shared governance, aligned budgets, integrated data, and neighborhood-rooted implementation partners, IEMD connects these strategies so that each reinforces the others. The result is a mobility engine that moves families from stability to opportunity and from opportunity to wealth-building.

The Challenge

For decades, residents on the Eastside have faced overlapping barriers that limit economic advancement. Housing instability, low wages, limited access to capital, and fragmented services create a cycle that is difficult to escape. Traditional approaches often address these issues independently, resulting in many good programs that rarely add up to sustained change.

- Families without stable housing struggle to maintain employment
- Workers without credentials cannot access family-sustaining wages
- Local businesses lack the capital to grow and hire
- Residents must navigate disconnected systems of support

These conditions compound rather than resolve one another. Breaking this cycle requires a coordinated, neighborhood-wide strategy that addresses the full ecosystem at once.

Our District Approach

IEMD replaces fragmentation with coordination. By concentrating investments within one geography and aligning partners under a shared framework, the District creates an integrated set of solutions that operate together.

Housing Innovation – Stability

Housing stability is the foundation for mobility. Families cannot pursue training or employment when housing is uncertain. IEMD preserves affordability, prevents displacement, and expands homeownership opportunities to build long-term wealth.

Workforce Development – Earnings

With stability in place, residents can focus on skill-building and career advancement. Employer-aligned training, industry credentials, and paid work experiences connect neighbors to quality jobs and sustainable wages.

Economic Development – Opportunity

A strong neighborhood economy creates the jobs residents are preparing for. Access to capital, business coaching, and site activation help local businesses grow, hire, and keep wealth circulating within the community.

How the System Works Together

These strategies are intentionally interdependent. Housing supports employment retention, workforce pipelines supply talent to local employers, and business growth generates more neighborhood jobs. Higher incomes make homeownership and savings possible, which in turn strengthen neighborhood stability. Each pillar reinforces the others, creating cumulative impact rather than isolated outcomes.

- Housing stability improves job retention and educational success
- Workforce training prepares residents for jobs created locally
- Business growth expands employment opportunities and wages
- Increased income supports homeownership and neighborhood investment
- Shared data and case management ensure seamless resident support

Governance and Alignment

IEMD is anchored by trusted neighborhood institutions working through shared governance and accountability structures. Partners coordinate staffing, budgets, reporting, and evaluation to ensure alignment. This structure transforms individual programs into a unified system and ensures that resources are deployed efficiently and equitably.

Expected Results

Over five years, this coordinated approach will produce measurable neighborhood-wide outcomes, including:

- Stable housing for hundreds of residents, preventing displacement and housing crisis
- New pathways to homeownership for 62 families
- Preservation of 1,000+ homes, ensuring seniors and long-time residents can remain rooted in the community.
- 180 families build savings and assets, unlocking opportunities for education, entrepreneurship, and homeownership
- Hundreds of workforce pathways, connecting residents to credentials and training supports, aligned with high-demand sectors
- 20 employers enter inclusive hiring partnerships that strengthen the local labor market
- Access to capital for 35 local contractors and small businesses, fueling local participation in housing and redevelopment projects
- Redevelopment readiness for catalytic sites, positioning underutilized 122+ acres of vacant land for productive reuse
- Nine stronger neighborhood-based organizations, building long-term leadership and capacity
- Integrated data and accountability systems to drive continuous learning and impact

These outcomes represent more than program outputs; they reflect a sustained shift in the economic trajectory of families and the neighborhood as a whole.

Conclusion: One Community. One System. One Pathway to Mobility.

IEMD is not housing plus workforce plus economic development. It is a coordinated neighborhood ecosystem where stability leads to skills, skills lead to jobs, jobs lead to wealth, and wealth reinforces stability. By aligning investments and working collectively, the District is building a self-reinforcing cycle of opportunity that delivers lasting economic mobility for residents.

The culmination of three neighborhood anchor agencies' commitment to alignment, the proposed District weaves each neighborhood's unique assets and characteristics in a manner that continues to respect distinct neighborhood identity, while ensuring common best practices translate in a unifying way. When realized, this innovative approach has the potential not only to transform a significant City geography, but also to inform and influence how social service sectors can operate with mutual investment and accountability.

John Boner Neighborhood Centers

Lilly Endowment Inc. | IndyEast Economic Mobility District Proposal

Executive Summary

Indianapolis' Eastside has demonstrated that sustained, place-based investment — when guided by community leadership and aligned across systems — can reverse disinvestment and expand opportunity. Building on decades of collaboration led by John Boner Neighborhood Centers, Edna Martin Christian Center, Southeast Community Services, and a broad network of public, private, and philanthropic partners, the IndyEast Economic Mobility District (IEMD) represents the next phase of this work: A coordinated, District-wide strategy to stabilize families, strengthen neighborhoods, and create clear pathways to economic mobility and generational wealth.

The IEMD is grounded in a clear theory of change: economic mobility depends on the intentional alignment of housing stability, workforce opportunity, and local economic development. Too often, investments in these areas operate in silos, limiting impact and placing the burden of coordination on residents. The IEMD breaks down these silos by integrating Housing Innovation, Workforce Development, and Economic Development strategies within a single, place-based framework — ensuring that progress in one area reinforces outcomes in the others.

Housing Innovation provides the foundation for mobility by stabilizing families and preserving affordability amid rising market pressure. Through tools such as predevelopment grants, owner-occupied repair funding, housing stability navigators, and the IndyEast Homeownership Initiative, the District will expand affordable housing supply, prevent displacement, and support long-term wealth building. Stable housing enables residents to pursue training, maintain employment, and invest in long-term goals, while strengthening community development capacity ensures that affordable housing production and preservation can scale sustainably.

Workforce Development builds on this stability by connecting residents to living-wage employment through employer-aligned training, paid work experience, and comprehensive supports. Industry-recognized credentials, training stipends, and barrier-reduction funds are delivered through trusted neighborhood-based Centers for Working Families, ensuring programs reflect the realities of residents' lives. The Employer Champions model directly links training to hiring demand, while retention coaching and coordinated employer engagement improve placement, advancement, and long-term job stability.

Economic Development reinforces both housing and workforce outcomes by strengthening local businesses, activating vacant land, and ensuring that investment generates community benefit. Through a contractor-focused Revolving Loan Fund, local hiring incentives, and a formal partnership with Indy Economic Development, Inc., the IEMD will align access to capital, workforce pipelines, and redevelopment strategy. This approach ensures that local businesses can participate in District redevelopment, residents can access jobs created by new investment, and economic growth circulates within the community.

Together, these strategies form a cyclical system: housing stability enables workforce participation; workforce readiness attracts and supports employers; and economic development generates jobs and reinvestment that sustain neighborhoods over time.

Implementation is guided by a strong governance and accountability structure — anchored by the Neighborhood Center Alliance and Partner Consortium — and supported by integrated data and evaluation systems that track outcomes across programs and inform continuous improvement.

The IEMD is not a collection of standalone programs, but a coordinated ecosystem designed to produce lasting, inclusive change. By aligning housing, workforce, and economic development investments at the District level, the IEMD offers a scalable, evidence-based model for advancing economic mobility in communities facing entrenched barriers — while ensuring that growth benefits the residents who call the Eastside home.

History and Mission

Over the past two decades, IndyEast partners have worked to restore prosperity after decades of disinvestment, job loss, and population decline. Through leadership from John Boner Neighborhood Centers (JBNC), Edna Martin Christian Center (EMCC), Southeast Community Services (SECS), and a network of committed partners, our neighborhoods have leveraged public, private, and philanthropic investments to deliver visible, lasting change. Landmark initiatives such as the Super Bowl Legacy Project and the IndyEast Promise Zone mobilized nearly $400 million in combined investments, expanding housing opportunities, improving infrastructure, and strengthening resident engagement and organizational capacity.

Building on that foundation, the IEMD represents the next evolution of this work: a bold, place-based initiative designed to strengthen communities, stabilize families, and create equitable pathways to economic mobility. The vision of the IEMD is a vibrant, inclusive, and welcoming District in which all families have access to the tools and resources needed to achieve economic mobility and build generational wealth.

The IEMD was created to ensure every Eastside neighbor has the opportunity to build wealth that stays local and lasts for generations. Its theory of change centers on stabilizing neighborhoods and intentionally directing investment back into long-neglected corridors in ways that benefit existing residents. By aligning partners, capital, and community-driven strategies, the District works to remove structural barriers, unlock opportunity, and strengthen the conditions that allow families and businesses to thrive. Grounded in decades of collaboration and guided by community voice, the IEMD reflects a proven commitment to inclusive growth and lays out the foundation for lasting, shared prosperity — built by and for the people who live here.

To advance this work, the IEMD is structured around seven interconnected pillars that together support neighborhood stability, wealth creation, and long-term economic mobility: Housing Innovation, Asset Building, Entrepreneurship and Business Enterprises, Lifelong Education, Economic Development, Social Enterprise, and Workforce Development. While all seven pillars are essential to the District's holistic approach, this proposal focuses intentionally on three core pillars — Housing Innovation, Economic Development, and Workforce Development — where partners are prepared to move from planning to implementation and where near-term investment can drive measurable impact.

The IEMD theory of action translates this vision into coordinated on-the-ground implementation. Grounded in data-driven evaluation and sustained community engagement, IEMD strategies respond directly to resident-identified needs and evolving market conditions. To operationalize this work, partners organized into cross-sector workgroups aligned with the three core focus areas as well as Evaluation and Coordination. These workgroups assessed current conditions, identified gaps, and developed scalable, long-term solutions that strengthen systems and create clear, connected pathways to economic mobility for residents.

Indianapolis' Eastside is at a critical inflection point. After decades of disinvestment, the District is experiencing renewed interest, investment, and redevelopment pressure—bringing both opportunity and risk. Rising housing costs, increased property values, and accelerating commercial activity threaten to displace long-time residents if growth is not intentionally shaped to benefit the community. At the same time, employers across key industries face persistent labor shortages, while residents continue to encounter barriers to stable employment, asset-building, and wealth creation. Years of planning and coordination have positioned the IEMD to respond decisively at this moment: partners are aligned, strategies are defined, and systems are ready to move from planning to implementation. Investment now ensures that growth strengthens—not fractures—neighborhoods, locking in affordability, connecting residents to quality jobs, and building a local economy that generates lasting, inclusive prosperity.

Target Geography

The IEMD footprint resides within the Eastside and Southeast communities of Indianapolis. Specifically, the target area includes the neighborhoods commonly known as Martindale-Brightwood, the Near Eastside, Fountain Square, Twin Aire, and parts of the Southeast side. This ~15.8 square mile area is the home of approximately 60,327 residents (as of the 2023 U.S. Census Bureau ACS 5-Year Estimates) and follows the following boundaries: I-65/70 and the Monon Trail to the west, Raymond Street to the south, Emerson Avenue to the east, and 30th Street to the north – inclusive of parcels along both sides of each boundary street and avenue. The target area encompasses the total area of the IndyEast Promise Zone, superimposed Opportunity Zones, and surrounding neighborhoods.

Housing Innovation

The Housing Innovation workgroup, facilitated by Intend Indiana and JBNC with support from Community Solutions, brought together a coalition of 19 affordable housing partners, community centers, and technical experts to coordinate strategy, align capacity, and develop innovative housing programs within the IEMD. Over the course of five months, the group evolved from foundational coordination and assessments to designing actionable housing strategies, programs, and financial tools aimed at enhancing stability, homeownership, and neighborhood resilience. With the large working group meeting six times and six specialized subgroups convening 16 times, the Housing Innovation workgroup developed targeted deliverables across the following areas: (1) Predevelopment Grant Program, (2) IndyEast Homeownership Initiative, (3) Owner Occupied Repair Fund, (4) Housing Stability Navigators, (5) Housing Stability for School Success Replication, (6) Opportunity Savings Program, and (7) Community Development Capacity Building.

The Housing Innovation workgroup's deliverables are grounded in key findings from CommunityScale's IEMD 2025 Housing Study. The study highlighted that while households earning the District median income can generally afford local housing, they struggle to access homes priced at the citywide median. Non-white and senior residents face particularly high risks of displacement. Demographic and income trends show the fastest growth among higher-income and White households, alongside an increase in seniors and single-person households, many of whom are low-income. Overall household growth is projected to increase by 10.4% by 2035, primarily driven by residents aged 35–49. On the supply side, more than half of the area's housing stock was built before 1940 and requires reinvestment, while an additional 2,581 new units are needed by 2035 to meet demand and ease affordability pressures. Critically low rental vacancies further heighten the risk of escalating prices. These trends underscore the need for equitable housing strategies that prioritize vulnerable groups, including seniors, renters, low-income, and non-white residents.

Predevelopment Grant Program

Lead Agency: JBNC
Investment: $2,000,000
Purpose: The Predevelopment Grant Program was developed to address existing gaps in funding for affordable rental housing developments by nonprofit organizations. The program enhances organizational capacity to produce affordable housing within the District by strengthening the ability to leverage additional funding sources, particularly Low-Income Housing Tax Credits (LIHTC). The program offers flexible requirements that allow organizations to move through the predevelopment phase faster than alternative funding sources.

Expected Output (5-year): 20 predevelopment grants of up to $100,000 each to support affordable rental housing development readiness.

Program Description

The Predevelopment Grant Program will support community-based nonprofits within the IEMD in advancing affordable rental housing projects by funding essential predevelopment and holding expenses. The program will provide 20 grants of up to $100,000 each to cover eligible costs such as land acquisition, site maintenance, insurance, legal and consulting services, environmental assessments, architectural and schematic design, market studies, capital needs assessments, surveys, permitting, and zoning or variance fees.

Over a five-year period, partner organizations may receive up to three grants, with no more than two active grants at a time. Eligible applicants include community-based organizations (CBOs) that have signed the IEMD memorandum of understanding (MOU), as well as partner entities working in collaboration with a CBO. Evaluation will incorporate housing data (e.g. renter cost burden, area median income levels) to inform funding decisions without serving as weighted scoring criteria. The Predevelopment Grant Program is intended to enhance organizations' capacity to produce affordable housing within the District by strengthening their ability to leverage additional funding sources, including LIHTC.

Associated Attachments: Predevelopment Grant Guide

IndyEast Homeownership Initiative

Lead Agency: Indianapolis Neighborhood Housing Partnership (INHP), IEMD Partners
Investment: $11,250,000
Purpose: This New Markets Tax Credit (NMTC) investment, led by IEMD and facilitated by INHP, is intended to expand sustainable homeownership opportunities and strengthen neighborhood stability within the IEMD. Homeownership opportunities have been a key success to IndyEast's housing strategy over the past two decades. These homes create new affordable housing opportunities for residents to live and become stakeholders in creating stronger neighborhoods. However, construction costs have significantly increased, which, consequently, increases the subsidy needed to develop these homes. Meanwhile, sale prices have risen over the past five 5 years, which makes homes harder to afford for low- and moderate-income buyers. The program would pair two NMTC allocations with down payment assistance to provide a portion of the subsidy necessary to provide homeownership opportunities to 62 families with low and moderate incomes in the IEMD.

Access to NMTC allocations is bolstered by an $80 million 2026 allocation of NMTC funds to the City of Indianapolis. INHP submitted an intake form on behalf of IEMD and is optimistic about consideration.

Expected Output (5-year): 55 new affordable homes constructed and sold to income-eligible buyers, supported by NMTC financing and down payment assistance. 62 constructed and sold by year nine.

Program Description

The IndyEast Homeownership Initiative leverages INHP's track record with NMTC and IEMD partners to deploy two NMTC allocations in support of affordable homeownership and neighborhood stabilization across the District. On IEMD's behalf, INHP will pursue allocations of NMTCs, which will leverage this Investment and other subsidy sources to fund affordable homeownership development. This Investment will provide $9.25 million for the required leverage loans to support two NMTC transactions and $2 million to provide direct buyer subsidy (down payment assistance). The combined NMTC net benefit and DPA would provide roughly 50% of the necessary subsidy. IEMD would be responsible for raising the rest. INHP will manage the NMTC fund compliance and own the properties, while partnering with various Eastside community-based organizations that will function as developers for these projects. The partnership will create a total of approximately 31 new homeownership projects per NMTC Transaction for a total of 62 new homes. The funds from the leverage loans will be recaptured upon sale of the homes and retained by the IEMD team, which will work within the governance structures to determine the appropriate use of the funds, including, but not limited to, additional NMTC transactions, development subsidy, or other affordable housing related uses. The return of this capital to IEMD promotes capacity building critical to this application by promoting sustained investment in affordable housing. Without this strategy, the IEMD would need to secure a private loan, which would increase the costs with interest rates and additional transaction fees, reducing the overall benefit. In addition, the loans would likely require IEMD to provide collateral, which would be difficult to consolidate.

Associated Attachments: New Markets Tax Credit Proforma

Owner-Occupied Repair Fund

Lead Agency: JBNC
Investment: $10,000,000
Purpose: The Owner-Occupied Repair (OOR) Fund will address urgent housing needs by enabling homeowners to remain safe in their homes, preserving long-term affordability, and reducing displacement pressures. Given that more than half of the District's homes were built before 1940, investments in small, critical, emergency, and energy-efficiency repairs are essential to maintaining homeownership for long-time IndyEast residents. While many community development corporations (CDCs) and community partners in the IEMD have had OOR programs in the past, restrictive funding opportunities and limited staff capacity have hindered program effectiveness. Organizations within the IEMD need flexible funding structures, specifically tiered grants, to improve their capacity and repair output for the community.

Expected Output (5-year): 1,000+ critical, emergency, and weatherization repairs completed for low- and moderate-income homeowners.

Program Description

To protect housing stability and prevent displacement, JBNC will administer an OOR Fund that delivers essential home repairs to low- and moderate-income homeowners. Through this fund, eligible partner organizations—such as CDCs and community centers—can apply for funding to assist homeowners with repairs in four categories: critical, small, emergency, and weatherization. Funding requests of up to $1,500,000 will be accepted on a rolling basis and reviewed by a local review committee to determine project feasibility. Eligibility will be based on the number and type of repairs an organization plans to complete within a set timeframe. Priority will be given to organizations serving IndyEast homeowners below 60% of Area Median Income (AMI), seniors aged 65 and older, and populations at elevated risk of displacement.

Associated Attachments: Owner-Occupied Repair Fund Guide

Housing Stability Navigators

Lead Agency: EMCC, JBNC, SECS
Investment: $1,125,000
Purpose: IndyEast neighborhood centers have seen a significant rise in clients seeking housing stability support. Center for Working Families (CWF) coaches and case managers juggle competing priorities across financial literacy, employment coaching, income support, and housing access. The discovery process made clear that current staff lack the necessary time and resources to effectively address complex housing challenges. These needs include developing a comprehensive landlord list, strengthening collaboration between housing programs, keeping pace with evolving housing regulations, and delivering targeted assistance to clients at risk of homelessness. Introducing a dedicated, landlord-facing Housing Stability Navigator would close this gap across all three centers.

Expected Output (5-year): One Housing Stability Navigator embedded at each neighborhood center to support housing stabilization and eviction prevention.

Program Description

The role of the Housing Stability Navigator is centered on the prevention of housing displacement for residents in the District. A navigator will be placed at IndyEast neighborhood centers, where they will serve as a liaison between financial coaches, legal aid partners, and landlords. The navigator position will play a critical behind-the-scenes role in building relationships, facilitating collaboration, and developing tools and trainings that support successful tenancies and reduce eviction risk. The navigator's primary responsibilities will include monitoring changes in housing programs and policies, building trusted networks of reliable landlords, and training and coaching staff to better assist residents at risk of losing housing. The navigators will meet monthly as a team to coordinate strategies and advance shared goals. Each navigator will have an on-site supervisor at their assigned neighborhood center.

Associated Attachments: Housing Stability Navigator Job Description

Housing Stability for School Success Replication

Lead Agency: EMCC
Investment: $1,500,000
Purpose: Since 2015, JBNC has operated the Housing Stability for School Success (HSSS) program in partnership with local area schools. The program provides affordable, stable housing for families with school-aged children. The program has supported familial economic mobility, with participants experiencing a 55% increase in household income, an average of 15 job placements annually, and a 12% increase in school attendance. Based on the success of the JBNC HSSS program, EMCC will replicate the program within Martindale-Brightwood to serve families of students in KIPP Indy Public Schools. KIPP Indy Public Schools educates 1,500 students in grades K-12 in the Martindale-Brightwood neighborhood and is part of a network of over 280 public charter schools in urban and rural areas across the country.

Expected Output (5-year): At least 12 new affordable rental units advanced through predevelopment for families with school-aged children.

Program Description
The Martindale Brightwood Education Zone Housing Village will offer a range of 1-, 2-, and 3-bedroom homes intentionally prioritized for families of children within KIPP Indy Public Schools. These homes will be part of a tangible wraparound support system built to keep families strong – rooted in stability and goal attainment – as well as keeping children on a steady path to educational and life-long success. By 2031, EMCC will develop at least 12 rental units to be leased to low-to-moderate income families. This investment will provide predevelopment capital for land acquisition, environmental assessments, surveys, and architectural design.

Associated Attachments: Martindale-Brightwood Education Zone Housing Village Predevelopment Strategy

Opportunity Savings Program

Lead Agency: JBNC
Investment: $1,510,000
Purpose: The IEMD Housing Study estimates that the affordable home price for a median-income household is approximately $286,765, yet even a modest 3% down payment—nearly $8,600—remains out of reach for many households without structured financial assistance. This challenge is particularly acute in a District where 53% of residents are renters and a significant share earn below 80% of AMI, the target population for District programming. These statistics

were validated over the course of four subgroup meetings with neighborhood center staff and supporting organizations. In keeping with this, the subgroup determined that the typical $3,000 Individual Development Account (IDA) match was no longer sufficient to meaningfully support first-time homebuyers, aspiring small business owners, or individuals pursuing postsecondary education in today's economic climate. Rising inflation and increased cost of living within the District necessitate a higher level of support; as a result, a $10,000 matched savings account was identified as a more effective tool to help eligible participants achieve their goals.

Expected Output (5-year): 180 emergency and asset-building savings accounts opened to support homeownership, education, home repair, or small business goals.

Program Description
The Opportunity Savings Program (OSP) follows a two-part IDA model designed for participants to build both short-term financial stability and long-term asset-building capacity. The program is designed to address emergencies, the largest reported barrier to completing IDA programs. In Part One, participants will open an Emergency Savings Account (ESA) to establish a financial cushion for unexpected expenses. Participants will save up to $500, matched dollar-for-dollar for a total of $1,000. ESA funds will be used for urgent needs such as car repairs, medical bills, or housing stability, with no documentation required. To access the match, participants must complete at least three hours of financial education. Participants may also make early withdrawals of unmatched funds if they redeposit their withdrawal within 12 months (if necessary).

Upon completion of the ESA savings, participants can advance to Part Two of the program, where they will open an IDA to support longer-term goals such as homeownership, home repair, higher education, or small business development. In this stage, participants may save up to $2,500 and receive a 3:1 match, bringing their total possible funds to $10,000. Participants must complete an additional six hours of asset-specific financial education, and, as in Part One, may make emergency withdrawals of unmatched funds if redeposited within a year. Together, the two-part structure equips participants with both immediate financial resilience and the tools to pursue lasting economic mobility.

Associated Attachments: Opportunity Savings Program Framework

Community Development Capacity Building
Lead Agency: JBNC
Investment: $1,000,000
Purpose: Throughout the IEMD planning grant process, Community Solutions was engaged to perform organizational assessments and develop capacity building plans for housing-related non-profit organizations serving the IEMD. Seven organizations in the District participated in a process to identify the capacity-building needs most essential to their long-term success. Each organization was paired with an individual coach throughout the process. Through a shared assessment process, each organization determined which investments would have the most significant impact on its ability to serve the community and were provided with an individualized capacity building plan to inform its decision-making.

Expected Output (5-year): 22 organizational capacity-building projects completed to strengthen nonprofit readiness for housing development and delivery.

Program Description

Through the assessment process, participating organizations developed 22 unique capacity-building projects designed to strengthen their long-term effectiveness, sustainability, and impact. The projects span a range of focus areas, including program expansion and innovation, operational and business planning, organizational culture and staff retention, and technology and evaluation systems. Collectively, these investments total $1,000,000 and are intended to address critical internal infrastructure needs that enable organizations to better deliver housing-related services and respond to evolving community needs. Project budgets are grounded in actual vendor quotes and current market-based cost estimates for comparable initiatives, ensuring realistic and implementable investments.

To implement capacity building plans, JBNC will administer the program and distribute funds to participating organizations through a streamlined application and reporting process. This approach balances accountability with flexibility, allowing organizations to move efficiently from planning to implementation while ensuring responsible stewardship of resources. By aligning funding with organization-defined priorities and providing light-touch administration, the program supports meaningful, lasting capacity improvements rather than one-size-fits-all solutions.

Associated Attachments: Capacity Building Report

Economic Development

The Economic Development workgroup, facilitated by Valo Advisory, JBNC, and Intend Indiana, focused on designing a comprehensive and inclusive economic development framework for the IEMD. Composed of 17 participants from the lead community centers, CDCs, business development organizations (BDOs), and community development financial institutions (CDFIs), the full group met six times over a six-month period. Two separate meetings were conducted between IEMD lead agencies and Indy Economic Development, Inc. (IEDI) to determine alignment with IEMD strategies, discuss partnership structures, and potential sites for development within the District. A subgroup met to discuss the Revolving Loan Fund strategy with 10 participating organizations. The Economic Development workgroup developed targeted deliverables across the following areas: (1) Economic Development Revolving Loan Fund, (2) Incentive for Jobs Program, (3) Indy Economic Development Partnership, and (4) Economic Development Capacity Building.

The IEMD is a small business economy that is highly entrepreneurial but constrained by scale and capital access. Home to 2,740 businesses employing 27,472 people, these businesses are made up of predominantly small enterprises with a median of four employees. Top sectors for sales in the District are wholesale, construction, and manufacturing. This aligns closely with Indianapolis' broader inclusive growth strategy, including the Brookings-informed focus on Opportunity Industries and good and promising jobs. There is a high concentration of miscellaneous manufacturing – over four times the national average – reinforcing the District's relevance to regional workforce and economic development priorities. Across Indianapolis, civic, workforce, and economic development partners are already investing in apprenticeship pathways, employer partnerships, and sector-based training aligned with key industries. The IEMD economic development initiative could tap into this existing momentum by coordinating access to capital, workforce pipelines, and employer engagement at the District level.

Economic Development Revolving Loan Fund

Lead Agency: To be determined
Investment: $1,000,000
Purpose: The Economic Development Revolving Loan Fund (RLF) is designed to strengthen the connection between housing, workforce, and economic development by providing flexible, affordable financing to small and mid-sized general contractors and subcontractors working with community partners. The fund will address a well-documented gap identified during the discovery phase: Many District-based contractors face difficulty securing short-term working capital to cover expenses during the period between project start-up and reimbursement for public or CDC-led development projects. By offering mission-driven, low-barrier loans that match construction timelines and cash flow realities, the RLF will help expand affordable housing production, strengthen local businesses, and create jobs for District residents.

Expected Output (5-year): 35 District-based contractors and small businesses financed to support housing and redevelopment projects.

Program Description

A program administrator (to be finalized) will manage day-to-day lending operations, underwriting, and compliance, under the oversight of an IEMD economic development advisory committee. The advisory committee will monitor utilization, performance metrics, and community impact, and recommend program adjustments during the implementation period to ensure alignment with District priorities. CDCs will refer qualified contractors, verify project milestones, and validate project-level impact. Technical assistance partners such as Jumpstart, LISC Indianapolis' Loan Readiness Workshops and Emerging Developer Growth Initiative (EDGI), and Urban Land Institute's Real Estate Diversity Initiative (REDI) will provide readiness coaching and pipeline support to ensure a continuous pool of eligible contractors. Loan amounts will be up to 50% of total construction costs, with an interest rate range of 6–10%, including potential rate adjustments based on local hiring commitments, minority-owned business (XBE) status, and underwriting risk factors. Funds may be used for direct construction expenses, labor, and limited soft costs related to eligible housing projects.

The Economic Development RLF transforms capital access from a barrier into a bridge — linking community development, workforce opportunity, and small business growth. By keeping dollars circulating within the District, pairing lending with technical assistance, and embedding performance accountability within program governance, the RLF ensures that economic mobility and housing delivery advance together.

Associated Attachments: Revolving Loan Fund Guidelines

Incentives for Jobs Program

Lead Agency: JBNC, EmployIndy, IEDI
Investment: $2,400,000
Purpose: The Incentives for Jobs Program is designed to address persistent barriers to local hiring faced by small and mid-sized businesses, many of which lack the internal human resources capacity, time, or financial flexibility to recruit, train, and onboard workers from within the community. While many employers are already engaged in workforce partnerships, the upfront costs of hiring and training often limit their ability—or incentive—to prioritize local and

inclusive hiring practices. This program provides a practical, low-barrier incentive that offsets a portion of these costs, reducing employer risk while reinforcing equitable hiring behavior. By supporting businesses that commit to hiring from CWF programs and invest in workforce development, the program strengthens pathways to quality employment, promotes inclusive economic growth, and aligns employer practices with the District's broader goals of job creation, wage growth, and community wealth building.

Expected Output (5-year): 90 District residents hired into full-time employment through wage-based employer incentives tied to neighborhood workforce pipelines.

Program Description

The Incentives for Jobs Program is a place-based workforce incentive designed to support local hiring, reduce onboarding costs for employers, and strengthen pathways to quality employment for District residents. The program will provide direct, wage-based incentives to new or expanding small- and mid-sized businesses located within the District that commit to hiring and retaining residents trained through CWF programs at EMCC, JBNC, or SECS. By offering a localized alternative to state and federal wage credit programs, the initiative creates a practical, low-barrier tool that aligns employer demand with neighborhood-based workforce pipelines. Eligible businesses must either participate in the Employer Champions Program (detailed on page 18) or demonstrate an established partnership with a CWF and be physically located within the IEMD geography. Employer Champions serve as visible partners in the District's workforce ecosystem, modeling inclusive hiring practices, offering career pathways, and coordinating with community organizations to reduce fragmentation across the workforce system. The IEMD will partner with EmployIndy and utilize EmployIndy's Customer Relationship Management (CRM) system to identify, engage, and manage relationships with eligible firms. Preference will be given to businesses operating within Opportunity Industries, including manufacturing, health care, construction, real estate, wholesale trade, and professional services.

EmployIndy will serve as fiscal agent for the program, responsible for receiving documentation, processing reimbursement requests, and disbursing funds to employers as appropriate. EmployIndy's administration of the Power Up program equips the agency with the existing infrastructure required for tracking wage reimbursements. Employers must submit a program application and regular wage reimbursement requests, including documentation of hire date, wage rate, hours worked, and total reimbursement requested. The Economic Development Manager and EmployIndy will develop shared tracking and reporting systems to ensure compliance, performance, and continuous improvement. Through this coordinated approach, the Incentives for Jobs Program advances inclusive economic growth by aligning employer incentives with workforce equity and retention.

Leveraging the Inclusivity Plan

As part of the Incentives for Jobs Program, the IEMD will leverage and expand the existing City of Indianapolis Inclusivity Plan framework to embed District-based workforce goals into City-managed incentive systems. Each company receiving a tax abatement or training grant already contributes at least 5% of its total tax savings toward activities that advance economic mobility, such as workforce training, childcare, or transit support. The IEMD can use this infrastructure to redirect a portion of those commitments to District priorities without creating new reporting requirements for employers or community organizations.

To implement this portion of the program, IEMD leadership will work with IEDI. Employers receiving City incentives within IEMD boundaries would receive an IEMD Inclusivity Addendum offering two participation options:

- **Option A:** Contribute 5% of tax savings to the CWF Workforce Development Fund, supporting training, wraparound services, and program capacity. This option is best for small employers or those without significant local hiring needs.
- **Option B:** Participate directly in the Employer Champions Program by committing to local hiring, guaranteed interviews, structured mentorship, hosting paid training, or workplace-based upskilling programs for District employees.

Together, the Incentives for Jobs and Inclusive Plan Strategy directly address long-standing equity and access gaps within the city's incentive ecosystem. By coupling local hiring incentives with the City's existing compliance infrastructure, the IEMD can ensure that economic growth generates tangible benefits for residents, small businesses and workforce partners – making the District a national model for equitable, outcomes-driven incentive design.

Associated Attachments: Incentives for Jobs Program Guidelines; Proposed Memorandum of Understanding: Indy Economic Development

Indy Economic Development Inc. Partnership

Lead Agency: JBNC, IEDI
Investment: $125,000
Purpose: Investing in an intentional partnership with IEDI is designed to operationalize the District's economic development strategy by connecting neighborhood-level relationships with citywide systems, data, and investment tools. Through this collaboration, the District will translate its 2025 planning priorities into coordinated action—supporting business retention and growth, attracting new investment, and advancing catalytic real estate redevelopment. IEDI's technical assistance, data integration, and alignment with municipal programs will ensure that District-based economic development efforts are measurable, competitive, and fully integrated into Indianapolis' broader economic development ecosystem. Together, this partnership bridges the gap between planning and implementation, strengthens local capacity, and positions the District for long-term, sustainable economic growth rooted in community priorities.

Expected Output (5-year): Five priority redevelopment sites advanced through coordinated investment strategy and technical assistance.

Program Description

This collaborative partnership seeks to integrate the priorities of the District into city-led economic development strategies, tools, and processes. Through coordinated planning, technical assistance, and shared implementation, IEDI will ensure that District-level economic development goals are aligned with—and benefit from—citywide systems, incentives, and investment mechanisms. IEDI will dedicate staff capacity to support IEMD initiatives and will work to ensure that local businesses receiving city-led incentives are encouraged to adopt Inclusivity Plan components that reflect IEMD priorities, including equitable hiring, wage standards, and community engagement practices.

Collectively, this partnership aims to increase capital investment within the District, create and retain jobs that pay a living wage, strengthen the ecosystem of small and locally owned businesses, raise household incomes and build community wealth, and support new construction and rehabilitation of commercial, industrial, and mixed-use properties. Additional objectives include reducing vacancy in industrial and commercial spaces, promoting the development of diverse, mixed-income housing, ensuring the equitable application of city economic development tools, and elevating the District's role within regional economic development strategies. By bridging neighborhood-based relationships with citywide resources, the team will advance inclusive, place-based economic growth that is responsive to community needs and positioned for long-term impact.

Priority Sites Identified

Across the IEMD, community and economic development partners reached a consensus: The potential for economic growth is vast but unrealized. The District contains more than 600 acres of former industrial and commercial land that once supported thriving employment centers. Redevelopment of these sites has the potential to generate between 2,500 and 7,500 jobs, depending on land use and industry mix, particularly in sectors such as construction, manufacturing, logistics, healthcare, and wholesale trade. Investment momentum is the strongest in commercial corridors closest to downtown. Multifamily housing leads the way in activity with adaptive reuse, and industrial expansions scattered throughout the District. Priority sites identified through this process provide a roadmap for strategic coordination among city, philanthropic, and private partners. Future phases should balance housing production with employment-based redevelopment to ensure inclusive and sustainable economic growth. City subsidies including NMTC, Tax Increment Financing (TIF), Tax Abatement, and Payment In Lieu Of Taxes (PILOT) have been essential tools for most recently completed projects, highlighting the continued need for public-private partnerships moving forward.

District partners identified several priority redevelopment sites that hold catalytic potential for future economic and community investment:

- **Black Mountain:** Offers substantial acreage for industrial reuse or employment-generating redevelopment along Washington Street, a key transportation corridor.
- **Sherman Park:** A major brownfield redevelopment and the site of significant public-private investment, including the RecycleForce headquarters.
- **Former Indiana Women's Prison:** A transformative opportunity for large-scale reuse, with strong community interest in a mix of housing, green space, and workforce-servicing uses.
- **Twin Aire Drive-in & Shopping Plaza:** Positioned near the Community Justice Campus, this site is critical to creating a connected employment and service hub in the Southeast corridor.
- **Marion County Juvenile Aid Center:** A strategically located property suitable for adaptive reuse tied to workforce, education, or social innovation programming.

Associated Attachments: Proposed Memorandum of Understanding: Indy Economic Development

Economic Development Capacity Building

Lead Agency: JBNC
Investment: $500,000
Purpose: The need for a District-based economic development role emerged clearly across multiple data points and stakeholder conversations. Eighty percent of District businesses have fewer than 10 employees yet represent the majority of local jobs. Many face growth barriers tied to capital access, permitting, and visibility – issues that require direct engagement and navigation support. Over 600 acres of vacant land or underdeveloped properties remain inactive and coordinated marketing and predevelopment support are essential to attract appropriate investment. Additional stakeholder feedback and one-on-one interviews highlighted gaps in employer engagement, site readiness, and coordination across CDCs and city departments. Neighborhood partners emphasized the importance of having a dedicated, on-the-ground representative who can build trust with small business owners, property owners, and developers while connecting them to city-level systems and strategic partners.

Expected Output (5-year): Shared tools, workplans, and coordinated district-level economic development activities established to support business growth and site activation.

Program Description

Valo Advisory will serve as a contracted economic development lead for the first year of implementation to build systems, activate early projects, and prepare for a sustainable District-based economic development position. The economic development lead will work closely with JBNC staff members, IEDI, and the IEMD leadership team. Together, this team will ensure that IEMD's business and investment initiatives are coordinated, measurable, and aligned with broader developments. Valo Advisory will work closely with JBNC staff and serve as a mentor and technical resource for professional development. The team will work together to connect small business activities into broader economic development objectives. This structure creates a paired leadership model with local expertise and on-the-ground support to foster long-term knowledge and sustainability.

After a transitional period, an Economic Development Manager will serve as the District's lead coordinator for business attraction, real estate activation, and partner alignment – translating strategic vision into tangible, measurable outcomes. The Economic Development Manager is a full-time position employed by JBNC, working in close partnership with IEDI. This unique role will serve as a District-level "concierge" for business and site developers – mapping real estate opportunities, building trust with local owners and entrepreneurs, and advocating for investment that aligns with community priorities. The core responsibilities for the role are business attraction and retention, real estate marketing and investment facilitation, relationship management, program design, and strategic alignment with workforce development initiatives. This position is designed to move from planning to action, serving as the operational engine of the IEMD's economic development strategy.

Vacant Property Map

To support data-driven redevelopment planning, CommunityScale was engaged during the planning process to create an interactive, publicly accessible Eastside Asset Map that visualizes vacant and underutilized properties across the District. This tool consolidates parcel-level data from multiple sources into a single, dynamic platform that can be updated over time. The map serves as a baseline inventory of redevelopment opportunity and will be maintained by the District, with updates scheduled every six months to capture new investment activity, property transfers, and site improvements. This allows partners – including neighborhood organizations, developers, and city agencies – to track the evolution of redevelopment within the district in real time.

Methodologically, the map identifies vacant parcels through two complementary approaches:

- **Assessor-Classified Vacant Parcels:** Properties designated as vacant commercial or vacant industrial land within the county's tax assessment data.
- **Value-Based Vacancy Proxy:** Properties are also flagged as "functionally vacant" if the land value exceeds 60% of the total assessed parcel value, indicating that the site is largely unimproved or underutilized even if it is not formally listed as vacant.

By combining both classification systems, the map captures a more accurate and comprehensive view of potential redevelopment. It also distinguishes between commercial, industrial, and residential vacancy, allowing planners and partners to visualize spatial patterns of disinvestment and prioritize redevelopment opportunities accordingly.

Associated Attachments: Proposed Economic Development Implementation Contract; Economic Development Manager Job Description; Vacant Property Map

Workforce Development

The Workforce Development workgroup, facilitated by Thomas P. Miller & Associates and SECS, advanced an equitable, coordinated workforce system designed to connect District residents to quality, living-wage employment. Over six months, the workgroup met seven times and brought together 16 participants from 10 organizations. Through this process, the group identified three core strategies to promote economic mobility within the IEMD: strengthening employer partnerships, expanding paid work experience (WEX) learning, and reducing barriers to employment.

As the work evolved, the workgroup shifted from an initial focus on customized training curricula to a stronger emphasis on work-based learning opportunities that more directly support residents. This shift led to the development of an Employer Champions Program, aimed at strengthening alignment between training providers and employers. Collectively, the workgroup produced targeted deliverables across seven focus areas: (1) Industry Recognized Certificate Programming, (2) Training Stipends, (3) Barrier Busting Funds, (4) Employer Champions Program, (5) Work Experience Learning, (6) Workforce Coordination Team, and (7) Center for Working Families Capacity Building.

The IEMD faces a complex workforce landscape, with both higher-than-average college attainment and elevated dropout rates; notably, 22% of residents lack a high school diploma, contributing to a limited middle-skills talent pipeline. Workforce efforts are largely driven by CBOs such as JBNC, EMCC, and SECS, which primarily serve Black and female residents (72%–76% and approximately 75%, respectively). At the same time, the District's concentration of miscellaneous manufacturing firms presents a significant opportunity for targeted workforce investment. In response, the Workforce Development implementation plan prioritizes employer engagement, integrated WEX programming, barrier reduction, expanded CWF capacity, and industry-recognized training pathways to improve access to quality employment for District residents.

Industry Recognized Certificates Program

Lead Agency: SECS
Investment: $1,500,000
Purpose: The Industry Recognized Certificates Program is designed to align workforce training with high-growth opportunity industries—construction, healthcare, manufacturing, and professional services—where employers face persistent talent shortages and residents seek access to stable, family-sustaining employment. These sectors offer clear pathways to upward mobility and living wages without requiring a four-year degree, yet barriers such as training costs, fragmented access, and limited employer coordination often prevent residents from entering or advancing in these fields. This program addresses those gaps by expanding access to industry-recognized credentials that are valuable to employers, applicable across the labor markets, and directly connected to local hiring demand. By investing in credentials that lead to quality jobs and long-term career progression, the program strengthens the local workforce pipeline, supports economic growth, and advances access to employment opportunities for IEMD residents.

Expected Output (5-year): 600 industry-recognized certifications completed in high-demand sectors aligned with employer needs.

Program Description
The Industry Recognized Certificates Program will establish a coordinated, District-wide approach to connecting IEMD residents with training and certification opportunities aligned to local employer demand. Financial support will be provided to approximately 600 participants to cover the cost of industry-recognized certifications, with an average investment of approximately $2,500 per individual, depending on the credential they pursue. Supported certifications include, but are not limited to, Commercial Driver's Licenses (CDL), Forklift Operator certification, NCCER Core (Construction), OSHA 30, Phlebotomy, Child Development Associate (CDA), Medical Coding, and other credentials aligned with District-identified industries. These certifications are portable, employer-recognized, and directly connected to jobs with clear wage and advancement pathways.

This program will be coordinated by SECS; however, participants will be supported throughout the process by neighborhood center-based career coaches, who will assess career readiness, identify appropriate certification pathways, and connect individuals with scheduled training cohorts. A District-wide Job Developer and EmployIndy will work in parallel to strengthen relationships with Employer Champions and industry partners, ensuring training offerings remain aligned with real-time hiring needs and creating opportunities for employer-informed credential development. Implementation timelines will vary based on the length and intensity of individual certification programs, allowing for flexibility while maintaining accountability for completion and employment outcomes. By centralizing access to training resources and prioritizing credentials valued by employers, the program reduces barriers to workforce entry and supports residents in securing stable, high-quality employment.

Associated Attachments: Industry Recognized Certificates & Training Stipends; Job Developer Job Description

Training Stipends

Lead Agency: SECS
Investment: $2,500,000
Purpose: Training and certification programs often require participants to reduce work hours or forgo income entirely, creating financial barriers that can prevent completion. Training Stipends are designed to close this gap by providing temporary financial support that allows participants to meet basic needs while enrolled in education or credentialing programs. By helping cover essential expenses such as food, utilities, and transportation, stipends increase program completion rates, shorten the time between training and employment, and improve participants' ability to successfully transition into quality jobs.

Expected Output (5-year): 600 training stipends deployed to reduce financial barriers and increase completion of credential programs.

Program Description
Stipends will be provided during the duration of approved training or certification programs to offset income loss and reduce financial stress that can otherwise derail participation. Funds are intentionally flexible, allowing participants to address immediate basic needs—such as transportation, childcare, food, or utilities—so they can fully engage in full-time or intensive training experiences required for upward economic mobility.

Approximately 600 participants will be supported through this program, with an average stipend of $2,500 per individual, calibrated to the length and intensity of the training program. Stipends will be disbursed at an hourly rate of approximately $18 during active participation, creating a financial bridge between enrollment in training and successful job placement. By streamlining stipends through SECS and expanding access, this strategy will reduce barriers to completion, accelerate transitions to employment, and ensure that workforce investments translate into measurable economic outcomes for both participants and employers.

Associated Attachments: Industry Recognized Certificates & Training Stipends

Barrier Busting Funds

Lead Agency: EMCC, JBNC, SECS
Investment: $900,000
Purpose: Barrier Busting Funds address the immediate financial crises that often prevent individuals from participating in training, maintaining employment, or achieving economic stability. Analysis of existing IEMD CWF programs demonstrates that these flexible supports are most frequently used to stabilize housing (84%) and address transportation (7%), debt (5%), and education-related needs (2%). Evidence from prior implementation shows that targeted, short-term assistance produces meaningful outcomes: 78% of participants receiving multiple payments experienced improvements in housing stability, debt reduction, or poverty status. These results underscore the critical role of barrier reduction in enabling sustained participation in workforce and economic mobility pathways.

Expected Output (5-year): 600 flexible, needs-based support payments provided to remove immediate barriers to training and employment.

Program Description
Barrier Busting Funds administered by the IEMD will establish a unified framework for providing flexible financial assistance that removes immediate obstacles to employment and training participation. Building on proven models operated by JBNC, EMCC, and SECS, the program will provide rapid-response support to address essential needs. These supports are intentionally flexible, allowing CWF coaches to respond quickly to participant needs that, if left unaddressed, would disrupt progress toward employment and economic stability. Outcomes from existing programs demonstrate the effectiveness of this approach. Between January 2024 and June 2025, 168 clients received 368 Barrier Busting payments averaging $1,351 each. As a result, 28 participants moved above the federal poverty threshold; 41 reduced their overall debt by an average of $8,740 after receiving approximately four payments; and 106 participants experienced an average monthly income increase of $1,007 following an average of three payments. These outcomes highlight the strong return on relatively modest, targeted investments.

Building on this success, Barrier Busting Funds will be expanded in the District to support approximately 600 participants engaged in CWF programming, with an average investment of $1,500 per person as needed. By directly addressing short-term financial instability, the program will improve retention in training and employment, reduce attrition, and ensure that investments in workforce development translate into sustained employment and long-term economic mobility.

Associated Attachments: Barrier Busting Report

Employer Champions Program

Lead Agency: EmployIndy
Investment: $1,125,608
Purpose: Employers across the IEMD report persistent difficulty filling critical roles in opportunity industries such as construction, human services, manufacturing, and health care; while training providers emphasize that participants are most successful when education and credentials lead directly to employment. Despite this alignment in need, gaps remain between employer expectations and the systemic barriers many workers face, including transportation access, childcare responsibilities, and reentry challenges. The Employer Champions initiative is designed to bridge this divide by engaging employers who recognize these realities and commit to flexible, inclusive workplace practices. Employer Champions partner with training providers to align curriculums with job opportunities, support paid WEX learning and transitional employment models, and adapt hiring and retention practices to broaden access to talent. By strengthening a network of Employer Champions, the District will create sustainable connections between training and employment, ensuring that residents can access quality jobs while employers build a reliable, job-ready workforce in high-demand industries.

Expected Output (5-year): 20 employers engaged and advanced to Employer Champion status through inclusive hiring and workforce partnership commitments.

Program Description
As part of the Employer Champions Program, employers will advance through clearly defined stages of engagement tracked within EmployIndy’s CRM system: Prospect, Engaged Partner, Active Partner, and Employer Champion. Each prospective employer will complete a readiness

and suitability assessment to ensure alignment with District workforce priorities, job quality standards, and inclusive hiring practices. EmployIndy and the IEMD will work in close partnership to coordinate outreach, align employer engagement with neighborhood-based workforce efforts, and leverage existing relationships held by community partners. Engaged Partners will participate in introductory activities such as hiring events, roundtables, and discussions, while Active Partners will collaborate on training or hiring initiatives and host or hire at least two trainees or other IEMD-referred candidates annually.

Employer Champions will represent the highest level of engagement, sustaining high-impact partnerships that could include guaranteed interviews, paid WEX opportunities, and the hosting or hiring of at least five trainees or other IEMD referrals per year. Employer Champions also serve as visible leaders in advancing inclusive hiring practices and job quality across the District. EmployIndy will lead employer engagement, data tracking, and reporting through its CRM, while IEMD partners provide on-the-ground coordination, participant referrals, and ongoing employer support. Together, EmployIndy and IEMD will host biannual employer roundtables and targeted hiring events at partner locations, ensuring employer efforts are integrated into a cohesive, District workforce strategy.

Associated Attachments: Eastside Employer Engagement Strategy

Work Experience Learning

Lead Agency: SECS
Investment: $180,000
Purpose: By integrating WEX across training and certification pathways, the IEMD will ensure that workforce investments translate into real employment outcomes for residents while accounting for the economic and social realities many participants face. By embedding paid, structured WEX into training, the IEMD reduces attrition associated with long credentialing pipelines, provides immediate income and industry exposure, and aligns learning with employer expectations. This approach benefits both workers and businesses—supporting participants who are balancing financial, family, or reentry challenges, while enabling employers to build trust, reduce hiring risk, and improve retention. Gradually institutionalizing WEX as part of CWF programming ensures that IEMD workforce programs are both employer-responsive and designed to move residents efficiently from training to stable employment.

Expected Output (5-year): 40 paid work experience placements completed to accelerate transitions from training to employment.

Program Description
The program will align with EmployIndy's Talent Bound framework to ensure consistency and quality across WEX placements, supporting career exploration in the classroom, and engagement through employer interactions and site visits. IEMD will establish standardized expectations for WEX placements, including defined hours, job duties, supervision, and performance evaluation, with a recommended target of 160 work hours per participant. Host sites will be identified six months in advance of each training cohort, with a goal of securing 5–10 employer partners per cohort to support placement availability.

The lead IEMD organizations (EMCC, JBNC, and SECS) will coordinate WEX placements, ensure wages or stipends are provided during the WEX period, and bundle barrier removal supports to promote completion. Participants will work with a CWF coach to provide ongoing support, address challenges, and facilitate transitions to employment. Through this coordinated approach, the WEX program is expected to support approximately 40 participants while improving training completion, accelerating job placement, and strengthening employer partnerships to drive long-term improvements in workforce development across the District.

Associated Attachments: Talent Bound Framework; Eastside Employer Engagement Strategy

Workforce Coordination Team

Lead Agency: SECS
Investment: $1,500,000
Purpose: The expanded workforce coordination team is designed to ensure that training, WEX learning, and job placement efforts lead to sustained employment and advancement for IEMD residents. By adding a District-wide Job Developer and embedding Retention Coaches within each CWF, the IEMD will strengthen the critical bridge between program providers, employers, and participant success. This coordinated staffing model aligns employer engagement, credentialing, experience, and job placement while providing long-term coaching to support retention, wage growth, and career advancement beyond initial hire. Together, these roles reduce fragmentation across the workforce system, improve responsiveness, and ensure that participants not only secure employment but remain connected to career pathways that lead to living wages and long-term mobility.

Expected Output (5-year): One Job Developer serving District-wide and one Retention Coach embedded at each neighborhood center to support placement and retention.

Program Description

Additional staffing is needed to strengthen participant outcomes and coordinate relationships among employers, EmployIndy, and the CWF teams. Each CWF will add a Job Retention Coach dedicated to supporting participants after placement, with a focus on employment stability, wage growth, and career advancement. Retention Coaches will work alongside CWF staff to address barriers that threaten job retention, support upskilling and promotion opportunities, and provide ongoing coaching for up to 36 months following job placement to ensure participants continue progressing along a defined career pathway.

In addition, the District will add a centralized Job Developer role serving all three neighborhood centers. The Job Developer will lead employer engagement and workforce strategy by identifying priority sectors and employer hiring needs, strengthening connections between training and job opportunities, and supporting participants' readiness for living-wage employment. Working closely with CWF staff, EmployIndy, and business partners, the Job Developer will recruit and support Employer Champions, co-design training and WEX opportunities, and oversee employer commitments that strengthen the District's workforce pipeline. Together, these roles will provide the operational capacity needed to move the IEMD from planning to implementation of a coordinated, employer-connected workforce development strategy.

Associated Attachments: Job Developer Job Description; Retention Coach Job Description

Center for Working Families Capacity Building

Lead Agency: EMCC, JBNC, SECS
Investment: $1,500,000
Purpose: The expansion of the IEMD's workforce initiatives—including industry-recognized credentials, WEX, employer partnerships, stipends, and barrier reduction—significantly increases the scope and intensity of services delivered through CWFs. Existing CWF coaches each currently serve an average of 50 participants annually and are already operating at capacity. To successfully implement the District's expanded workforce strategy and ensure high-quality, participant-centered service delivery, additional flexible capacity is required at each Center to support increased coordination, administration, data tracking, and participant engagement.

Expected Output (5-year): Aligned systems, staffing, and tools implemented across the CWF network to deliver coordinated workforce programming at scale.

Program Description

The Center for Working Families Capacity Building strategy provides flexible, multi-year funding to EMCC, JBNC, and SECS to strengthen the operational infrastructure necessary to deliver expanded workforce programming under the IEMD. This funding is intentionally designed to allow each Center to address its unique capacity needs as program demands increase, including staffing support, technology upgrades, data and reporting systems, participant tracking, employer coordination, and administrative functions tied to stipends, certifications, WEX placements, and barrier-busting supports.

As the primary point of contact for participants, CWF staff play a critical role in coordinating training enrollment, monitoring progress, administering financial supports, and maintaining continuous engagement through job placement and retention. By investing $100,000 annually in each CWF over five years, the IEMD ensures that these neighborhood-based organizations have the infrastructure, flexibility, and resilience needed to scale workforce services sustainably. This investment strengthens the backbone of the District's workforce system, reduces staff burnout, improves coordination across partners, and ensures that the expanded workforce strategy translates into consistent outcomes for residents pursuing living-wage employment.

Program Data and Evaluation

The Data and Evaluation workgroup, led by CityStrategies and JBNC, developed an evaluation framework to measure impact, track progress, and strengthen accountability across all IEMD initiatives. Meeting bi-weekly, the group advanced from early framework design to detailed metric development, focusing on the integration of data across housing, workforce, and economic development systems. Together, the team created a framework and evaluation matrix designed to balance quantitative performance tracking with qualitative storytelling, ensuring that community impact could be captured through both measurable outcomes and lived experiences. This comprehensive approach captures the full picture of IEMD initiatives.

Community-Level Goals

Community-level goals will 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.

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.

Housing Innovation

The District's approach to housing focuses on expanding the supply of affordable, quality homes — both rental and ownership — and 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 will 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
- # Affordable (subsidized) units
- # and % Housing units affordable to median earning household
- % Change in residential assessed value v. Marion County
- Residential stability among supported households
- CBO capacity for increased project volume/complexity

Associated Attachments: IEMD Evaluation Plan, pg. 11-13

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-owned and 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

Associated Attachments: IEMD Evaluation Plan, pg. 9-11

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

Associated Attachments: IEMD Evaluation Plan, pg. 13-15

Program Coordination and Accountability

The coordination and accountability of IEMD implementation will be led by leadership from JBNC, EMCC, and SECS – formalized through a MOU. During the planning process, lead agencies built a unified governance model, refining the District's guiding vision, and strengthening partnerships to support long-term implementation of the IEMD. Over a five-month period, the workgroup formalized the District's mission, advanced shared decision-making frameworks, and established the collaborative infrastructure needed to guide future operations and accountability.

Neighborhood Center Alliance

The three neighborhood centers — JBNC, EMCC, and SECS — formed the Neighborhood Center Alliance to formalize their shared commitment to the IEMD's vision, theory of change, and theory of action. On September 19, 2025, the partners executed a MOU that codifies this collaboration and establishes the Alliance as a permanent standing committee with an advisory role to the Partner Consortium (detailed below). The MOU institutionalizes shared governance, coordination, and accountability among the Centers and provides for automatic renewal for two consecutive five-year terms unless modified or terminated by mutual agreement or written notice from a participating partner.

Associated Attachments: Memorandum of Understanding: Neighborhood Center Alliance

Partnership Consortium

The IEMD's coordination and accountability structure is designed to ensure collaborative leadership, clear oversight, and resident-centered decision-making. The Partner Consortium — comprised of representatives from all IEMD partner organizations — will meet at least twice annually to provide strategic direction, oversee implementation progress, and ensure that data systems are developed, shared, and used to inform continuous improvement.

Supporting the Consortium is the Neighborhood Center Alliance, formed by the executive leaders of the JBNC, EMCC, and SECS, along with key IEMD staff. The Alliance serves as a permanent advisory body that promotes cross-organizational alignment, shared accountability, and coordinated execution of the District's mission and goals. While advisory in nature, the Alliance plays a critical role in advancing collaboration and operational coherence across partners.

Implementation is further supported through standing and ad hoc committees and subcommittees focused on specific initiatives and strategies, which will be established or dissolved by the Consortium as needed. Resident engagement is embedded throughout all levels of governance through the community organizing and asset-based development approaches or each partner organization, ensuring that IEMD strategies remain grounded in the lived experience, priorities, and aspirations of District residents.

Associated Attachments: Proposed Memorandum of Understanding: Partnership Consortium; Proposed Addendums: Implementation Partners

IndyEast Economic Mobility District

Budget

Housing Innovation	LEI Request
Predevelopment Grant Program	$2,000,000
IndyEast Homeownership Initiative	$11,250,000
Owner-Occupied Repair Fund	$10,000,000
Housing Stability Coaches	$1,125,000
Housing Stability for School Success Replication	$1,500,000
Opportunity Savings Program	$1,510,000
Community Development Capacity Building	$1,000,000
Subtotal	**$28,385,000**
Economic Development	
Economic Development Revolving Loan Fund	$1,000,000
Incentives for Jobs Program	$2,400,000
Indy Economic Development Liaison	$125,000
Economic Development Capacity Building	$500,000
Subtotal	**$4,025,000**
Workforce Development	
Industry Recognized Certificates Programming	$1,500,000
Training Stipends	$2,500,000
Barrier Busting Funds	900,000
Employer Champions Program	$1,125,608
Work Experience Learning	$180,000
Workforce Coordination Team	$1,500,000
Center for Working Families Capacity Building	$1,500,000
Subtotal	**$9,205,608**
Program Infrastructure & Support	
Technical Assistance	$1,050,000
Program Administration, Systems & Evaluation	$5,112,024
Indirect Cost (5%)	$2,350,000
GRAND TOTAL	**$50,127,632**

INDYEAST ECONOMIC MOBILITY DISTRICT

Budget Narrative

Total Request: $50,127,632

Housing Innovation // $28,385,000

Predevelopment Grant Program: Up to 20 predevelopment grants of up to $100,000 each, covering eligible costs such as land control, architectural and engineering design, environmental studies, legal services, market analyses, and permitting needed to advance affordable housing projects to financing readiness.

IndyEast Homeownership Initiative: Two NMTC transactions to subsidize construction of approximately 62 affordable homeownership units (about 31 per transaction), offsetting rising construction costs and reducing purchase prices for low- and moderate-income buyers.

Owner-Occupied Repair Fund: Funds critical, emergency, and weatherization repairs for several hundred homeowners over five years, with grant sizes calibrated to address aging housing stock (pre-1940 homes) and prioritize seniors and households below 60% AMI.

Housing Stability Navigators: Salaries and benefits for three full-time Housing Stability Navigators over five years to support eviction prevention, landlord engagement, and housing coordination.

Housing Stability for School Success Replication: Supports predevelopment and early implementation costs to develop at least 12 affordable rental units for families with school-aged children, replicating a proven housing-plus-education model with documented income and attendance gains.

Opportunity Savings Program: Supports approximately 180 participants through a two-phase matched savings model, providing up to $8,000 per participant (including emergency savings and IDA matches) calibrated to current homeownership, education, and small business costs. Includes cost of Home Keeper tracking system.

Community Development Capacity Building: 22 targeted capacity-building projects across 7 housing-focused nonprofits, based on organization-specific assessments and market-based cost estimates to strengthen development, staffing, and data systems.

Economic Development // $4,025,000

Economic Development Revolving Loan Fund: Revolving loan fund providing short-term working capital loans of up to 50% of construction costs to local contractors, addressing cash-flow gaps that limit participation in affordable housing and community development projects. Potential to revolve 35 times.

Incentives for Jobs Program: Wage subsidies for small and mid-sized employers hiring District residents, providing 25–75% wage reimbursement for up to six months (capped at $24/hour), plus a $500 sign-on bonus, to support approximately 90 placements based on employer training and retention commitments.

Indy Economic Development Inc. Partnership: $25,000/year to cover expenses related to dedicated IEDI staff time, technical assistance, data integration, and coordination required to align District redevelopment priorities with citywide economic development tools.

Economic Development Capacity Building: Supports phased economic development staffing and technical assistance, including a contracted lead and full-time District Economic Development Manager, to coordinate business attraction, site activation, and employer engagement.

Workforce Development // $9,205,608

Industry-Recognized Certificates Program: Costs to support approximately 600 residents earning employer-recognized credentials at an average of $3,500 per certificate program.

Training Stipends: 600 direct participant stipends disbursed during training periods to offset lost wages and basic living expenses at an average of $2,500 per participant.

Barrier Busting Funds: Flexible direct assistance to 600 participants for housing, transportation, utilities, debt relief, and emergency needs, administered through existing CWF infrastructure with streamlined approval processes at an average of $1,500 per person.

Employer Champions Program: EmployIndy engagement staffing, CRM tracking, convenings, outreach activities, and coordination necessary to secure hiring, training, and work experience commitments.

Work Experience Learning: Funds cover 40 placements in paid work experience over 5 years with an average of 160 hours at $20/hr.

Workforce Coordination Team: Salaries and benefits for a District-wide Job Developer and Retention Coaches embedded at three Centers for Working Families.

Center for Working Families Capacity Building: $100,000 annually to each of three Centers over five years to support staffing, technology, data systems, administrative capacity, and coordination required to deliver expanded workforce services.

Program Infrastructure and Support // $8,512,024

Technical Assistance: Funds to support technical assistance needed throughout the 5-year period, additional leadership development and capacity building, and administrative costs for Incentives for Jobs Program fiscal agent.

Program Administration, Systems and Evaluation: Funds to support salaries and benefits for a coordination team of 5 team members to lead implementation, data and evaluation contractor costs, communications and grants/leverage support, staff professional development, and program supplies.

Indirect Cost: Costs to support the shared administrative, financial, and operational infrastructure required to manage a multi-partner, district-wide initiative of this scale, including fiscal management, accounting and audits, grants compliance, legal and insurance costs, human resources, information technology, data security, and general organizational operations.

INDYEAST ECONOMIC MOBILITY DISTRICT

Key Performance Indicators

The measures below represent IEMD's key performance indicators, focused on measurable changes in lives and neighborhood conditions. Operational and internal metrics will be monitored separately to support effective implementation.

Housing Innovation

Predevelopment Grant Program

Expected Output (5-year): 20 predevelopment grants of up to $100,000 each to support affordable rental housing development readiness

Key Performance Indicators:

- Number of affordable housing projects advanced to financing readiness
- Number of LIHTC and other capital applications submitted

IndyEast Homeownership Initiative

Expected Output (5-year): 55 new affordable homes constructed and sold to income-eligible buyers, supported by NMTC financing and down payment assistance. 62 constructed and sold by year nine

Key Performance Indicators:

- Number of new affordable homeownership units constructed and sold to income-eligible buyers
- Amount of down payment assistance layered for eligible buyers

Owner-Occupied Repair Fund

Expected Output (5-year): 1,000+ critical, emergency, and weatherization repairs completed for low- and moderate-income homeowners

Key Performance Indicators:

- Number of owner-occupied homes preserved through completed repairs
- Number of senior and long-time homeowners stabilized and remaining housed

Housing Stability Navigators

Expected Output (5-year): One Housing Stability Navigator embedded at each neighborhood center to support housing stabilization and eviction prevention

Key Performance Indicators:

- Number of households avoiding eviction or displacement
- Housing stability rate for assisted households at 12 months

Housing Stability for School Success Replication

Expected Output (5-year): At least 12 new affordable rental units advanced through predevelopment for families with school-aged children

Key Performance Indicators:

- Number of affordable rental units developed for families with school-aged children
- School attendance stability among participating households

Opportunity Savings Program

Expected Output (5-year): 180 emergency and asset-building savings accounts opened to support homeownership, education, home repair, or small business goals

Key Performance Indicators:

- Number of households building emergency savings and asset accounts
- Amount of matched savings deployed for homeownership, education, or small business goals

Community Development Capacity Building

Expected Output (5-year): 22 organizational capacity-building projects completed to strengthen nonprofit readiness for housing development and delivery

Key Performance Indicators:

- Number of nonprofit partners increasing affordable housing production or preservation capacity
- Increase in development readiness among participating organizations

Economic Development

Economic Development Revolving Loan Fund

Expected Output (5-year): 35 District-based contractors and small businesses financed to support housing and redevelopment projects

Key Performance Indicators:

- Number of local contractors and small businesses financed
- Dollar amount of capital deployed to District-based firms
- Number of housing or redevelopment projects supported by financed businesses

Incentives for Jobs Program

Expected Output (5-year): 90 District residents hired into full-time employment through wage-based employer incentives tied to neighborhood workforce pipelines

Key Performance Indicators:

- Number of District residents hired into full-time employment
- Job retention rate at 6 and 12 months

Indy Economic Development Partnership

Expected Output (5-year): Five priority redevelopment sites advanced through coordinated investment strategy and technical assistance

Key Performance Indicators:

- Number of priority sites advanced with investment strategies
- Amount of new public or private investment catalyzed within the District

INDYEAST ECONOMIC MOBILITY DISTRICT

Economic Development Capacity Building

Expected Output (5-year): Shared tools, workplans, and coordinated district-level economic development activities established to support business growth and site activation

Key Performance Indicators:

- Reduction in commercial and industrial vacancy within targeted corridors
- Increase in small business retention and expansion in the District

Workforce Development

Industry-Recognized Certificates Programming

Expected Output (5-year): 600 industry-recognized certifications completed in high-demand sectors aligned with employer needs

Key Performance Indicators:

- Number of industry-recognized credentials completed
- Credential completion rate among enrolled participants

Training Stipends

Expected Output (5-year): 600 training stipends deployed to reduce financial barriers and increase completion of credential programs

Key Performance Indicators:

- Training completion rate among stipend recipients
- Reduction in training attrition due to financial instability

Barrier Busting Funds

Expected Output (5-year): 600 flexible, needs-based support payments provided to remove immediate barriers to training and employment

Key Performance Indicators:

- Number of participants maintaining housing or employment stability after receiving support
- Reduction in participant debt or financial crisis indicators

Employer Champions Program

Expected Output (5-year): 20 employers engaged and advanced to Employer Champion status through inclusive hiring and workforce partnership commitments

Key Performance Indicators:

- Number of Employer Champions hiring District residents
- Number of paid work experiences or hires generated through Champion partnerships

Work Experience Learning

Expected Output (5-year): 40 paid work experience placements completed to accelerate transitions from training to employment

Key Performance Indicators:

- Number of paid work experience placements completed
- Placement-to-employment conversion rate

Workforce Coordination Team

Expected Output (5-year): One Job Developer serving District-wide and one Retention Coach embedded at each neighborhood center to support placement and retention

Key Performance Indicators:

- Job placement rate among workforce participants
- Employment retention rate at 12 months

Center for Working Families Capacity Building

Expected Output (5-year): Aligned systems, staffing, and tools implemented across the CWF network to deliver coordinated workforce programming at scale

Key Performance Indicators:

- Number of residents achieving sustained employment through CWF services
- Increase in wage growth or income stability among participating households

Glossary of Acronyms

Acronym	Agency Name / Definition
AMI	Area Median Income
BDO	Business Development Organization
BRE*	Business Retention and Expansion
CBO	Community-Based Organization
CBDO*	Community-Based Development Organization
CDA	Child Development Associate
CDBG*	Community Development Block Grant
CDC	Community Development Corporation
CDFI	Community Development Financial Institution
CDL	Commercial Driver's Licenses
CICP*	Central Indiana Corporate Partnership
COGS*	Cost of Goods Sold
CRM	Customer Relationship Management
CWF	Center for Working Families
EDGI	Emerging Developer Growth Initiative
EMCC	Edna Martin Christian Center
ESA	Emergency Savings Account
FHLBI*	Federal Home Loan Bank of Indianapolis
HSSS	Housing Stability for School Success
IDA	Individual Development Account
IEDI	Indy Economic Development, Inc.
IEMD	IndyEast Economic Mobility District
Indy CDE	Indianapolis Community Development Entity
INHP	Indianapolis Neighborhood Housing Partnership
JBNC	John Boner Neighborhood Centers
LIHTC	Low-Income Housing Tax Credits
MBE*	Minority Business Enterprise
MOU	Memorandum of Understanding
NMTC	New Markets Tax Credit
OOR	Owner-Occupied Repair
OSP	Opportunity Savings Program
PILOT	Payment In Lieu Of Taxes
REDI	Real Estate Diversity Initiative
RLF	Revolving Loan Fund
SECS	Southeast Community Services
TIF	Tax Increment Financing
VBE*	Veteran Business Enterprise
WBE*	Women Business Enterprise
WEX	Work Experience
XBE	Minority-Owned Business

**Acronym appears in attachment documents*

Supporting Documents

Housing Innovation

1. Predevelopment Grant Guide
2. New Markets Tax Credit Proforma
3. Owner-Occupied Repair Fund Guide
4. Housing Stability Navigator Job Description
5. Martindale-Brightwood Education Zone Housing Village Predevelopment Strategy
6. Opportunity Savings Program Framework
7. Capacity Building Report
8. Housing Innovation Timeline
9. Housing Study

Economic Development

10. Revolving Loan Fund Guidelines
11. Incentives for Job Program Guidelines
12. Proposed Memorandum of Understanding: Indy Economic Development
13. Proposed Economic Development Implementation Contract
14. Economic Development Manager Job Description
15. Vacant Property Map
16. Economic Development Timeline
17. Economic Development Engagement Framework

Workforce Development

18. Industry Recognized Certificates & Training Stipends
19. Job Developer Job Description
20. Barrier Busting Report
21. Eastside Employer Engagement Strategy
22. Talent Bound Framework
23. Retention Coach Job Description
24. Workforce Development Timeline

Program Data and Evaluation

25. Evaluation Plan

Program Coordination and Accountability

26. Memorandum of Understanding: Neighborhood Center Alliance
27. Proposed Memorandum of Understanding: Partnership Consortium
28. Proposed Addendums: Implementation Partners

IndyEast Economic Mobility District
Predevelopment Grant Guide

Grant amount	Up to $100,000
Application deadline	On a rolling basis
Notification	Within four weeks of submitting the application
Date projects may begin	[insert date]
Date funds must be used	[insert date] - must be five years after projects begin
Additional details	• Organizations may receive up to three grants but cannot have more than two active at a time. • IEMD plans to award 20 Predevelopment Grants between 2026 and 2031.

Introduction
The IndyEast Economic Mobility District's Predevelopment Grant Program addresses existing gaps in funding for housing developments by nonprofit organizations. The program enhances organizations' capacity to produce affordable housing within the district by strengthening their ability to leverage additional funding sources, particularly LIHTC. The program offers flexible requirements that allow organizations to move through the predevelopment phase faster than alternative funding sources.

Eligibility
- Eligible applicants: 501(c)(3) community-based organizations that have signed the IEMD MOU, as well as partner entities working in collaboration.
- Eligible uses of funds are land acquisition, site maintenance, insurance, legal and consulting services, environmental assessments, architectural and schematic design, market studies, capital needs assessments, surveys, permitting, and zoning or variance fees.
- An organization may only have two active IEMD predevelopment grants at a time and can only be awarded up to three total IEMD predevelopment grants between 2026 and 2031.
- Applicants must serve communities within the IEMD boundaries. See the attached map for boundaries and map overlay.

Requirements and Evaluation
- Proposals must be submitted through the IEMD grant portal.
- Proposals should include a clear plan for how the organization will distribute sufficient financial and human resources to operate within the proposed budget.
- IEMD prioritizes funding for projects that serve the following populations:
  - Homeowners and renters within the IEMD boundaries
  - Homeowners and renters earning 80% of Area Median Income (AMI) or below.
  - Seniors (age 65 and older)
  - Populations at high risk of displacement, including long-term residents in rapidly changing neighborhoods.
  - Areas where renters have high housing cost burden

- All projects will be scored on the following criteria:
    - Project feasibility
    - Organizational capacity
    - Prior experience of operating organizations
- Applicants must report one or more of the following metrics:
    - AMI level
    - # of affordable housing units developed, renovated or preserved
    - Cumulative $ amount leveraged for investment in the preservation, renovation, or development of affordable housing units
    - # of organizational partnerships developed or strengthened to address affordable housing metrics
    - Other(s):___________(share a maximum of five metrics)

Restrictions
The IEMD Predevelopment Grant Program does not support the following:

- For-profit organizations and businesses
- Capital requests, such as building construction, renovations, equipment purchase or major repair
- Grants for individuals
- Regranting funds
- Endowment contributions

Submission and Grants Portal
Applications are accepted on a rolling basis and reviewed every month
Applicants must submit all application and reporting materials using the IEMD Grants Portal. First time applicants create a user profile for their organization. Organizations already registered in the IEMD Grants Portal must update the organizational profile prior to submitting a new proposal.
For guidance on setting up an account and navigating an applicant profile, please refer to the Grants Portal 101 resource for guidance or send a request for support to [email address].
The IEMD Grants Portal allows for the submission of an organization's supporting materials, applications, financials, organizational documents, and reporting. This centralized hub provides a single platform for both IEMD staff and applicants, helping to streamline the grantmaking process and minimize duplicate information. If your organization has not applied for funds before, sign up for Grants Portal here.

Review and Notification
IEMD staff will assess each proposal based on the extent to which the project aligns with the guidelines presented in this grant guide.
IEMD staff will notify applicants about the status of their proposal within four weeks of applying for the grant. Applicants may also check the status of their applications by signing into the IEMD grant portal.

Administration
This grant fund is administered by John Boner Neighborhood Centers, a lead agency of the IndyEast Economic Mobility District.
Grant awardees must:

- Electronically sign a copy of the agreement in the grant portal. This is a standard agreement and is nonnegotiable. The IEMD reserves the right to cancel the agreement if awardee makes significant changes to scope, purpose, activities, budget or timeline without obtaining permission from the IEMD grant staff.
- Comply with state and federal nondiscriminatory statutes.
- Report significant changes in the project to the IEMD grant staff.
- Acknowledge the IndyEast Economic Mobility District as stipulated in the grant agreement.
- Submit a final report (including documentation of final expenditures and cost share) at the conclusion of the project.
- Retain auditable records of IEMD grant funds

Grant Disbursement Policy
The IEMD Predevelopment Grant Fund provides financial support for early-stage housing project activities. To ensure accountability and timely progress, all awards are disbursed in two installments: **50% at the beginning of the grant period and 50% at the midpoint**. This summary outlines the requirements for receiving each disbursement and the expectations for grantees.

<u>Disbursement Structure:</u>
- Initial Disbursement (50%): Released at the start of the grant period after administrative and compliance steps are completed.
- Midpoint Disbursement (50%): Released once the grantee demonstrates satisfactory progress, submits required documentation, and confirms continued project feasibility.

<u>Requirements for Initial Disbursement (50%):</u>
To receive the first payment, grantees must submit:
1. Signed grant agreement
2. Administrative documents, including W-9, ACH authorization, and insurance verification (if required)
3. Approved project work plan and budget
4. Once these materials are received and verified, the first disbursement will be processed.

<u>Requirements for Midpoint Disbursement (50%):</u>
To receive the second payment, grantees must submit:
1. Midpoint Progress Report summarizing completed activities and progress towards milestones
2. Expenditure summary or ledger showing use of initial disbursement
3. Updated project timeline, if applicable
4. Confirmation of compliance with all reporting requirements
5. Midpoint documentation must demonstrate that the project remains feasible and aligned with program goals.

<u>Disbursement Adjustments:</u>
Payment may be delayed or withheld if:
- Required documentation is incomplete
- Spending is inconsistent with the approved budget
- The project is significantly delayed or noncompliant
- Activities no longer align with program goals

<u>Closeout Requirements</u>
At the end of the grant period, grantees must submit:
- Final Report detailing completed activities

- Final Expenditure Report confirming use of funds
- Completion of closeout requirements influences eligibility for future IEMD funding.

Application Support
Please contact IEMD staff regarding funding opportunities before submitting a proposal.
For guidance on setting up an account and navigating an applicant profile, please refer to the Grants Portal 101 resource for guidance or send a request for support to [email address].

NMTC Transaction Example

SF Proforma		
	Single Family (80% AMI)	
	Per Unit	Total
Units		31
COGS*	$ 320,000	$ 9,920,000
Average Sale	$ 165,000	$ 5,115,000
Closing Costs	$ 15,000	$ 465,000
Net Proceeds	$ 150,000	$ 4,650,000
Subsidy Needed	$ 170,000	$ 5,270,000

Sources	
Sales Proceeds (1st Mortgage Loans)	$ 4,650,000
NMTC Subsidy (Net Benefit)	$ 1,500,000
Other Sources (Philanthropy, City, FHLBI, Etc)	$ 2,770,000
LEI funded IEMD DPA	$ 1,000,000
Total Sources	**$ 9,920,000**
Total Uses	**$ 9,920,000**

*LEI funding of $9.25 million in the form of leverage loans into the NMTC transaction will provide the working capital for the majority of the construction costs. When the home buyer secures a 1st mortgage to acquire the home, the transaction will be repaid.

IndyEast Economic Mobility District
Owner-Occupied Repair Fund Guide

Grant amount	Up to $1,500,000 per application
Application deadline	On a rolling basis
Notification	Within four weeks of submitting the application
Date projects may begin	[insert date]
Date funds must be used	[insert date] - must be five years after projects begin
Additional details	Each year, partner organizations may submit an application outlining the number and type of repairs they expect to complete (for example: 50 small repairs and 10 critical repairs). Funding allocations will be made based on projected demand, alignment with program priorities, and available resources. Partners will report progress, using an IEMD grant portal, throughout the year to ensure accountability and allow for possible reallocation of unused funds.

Introduction
The Owner-Occupied Repair Fund addresses urgent housing needs by enabling homeowners to remain safe in their homes, preserving long-term affordability, and reducing displacement pressures. Given that more than half of the district's homes were built before 1940, investments in small, critical, emergency, and energy-efficiency repairs are essential.

Eligibility
- Eligible applicants: 501(c)(3) community-based organizations that have signed the IEMD MOU, as well as partner entities working in collaboration.
- Applicants must serve communities within the IEMD boundaries. See attached map for boundaries and map overlay.

Eligible uses:
- **Emergency Repairs –** Critical failure of a core utility. Repairs that cannot wait more than 48 hours for the survival/safety of the homeowner. These repairs may require an immediate step to prevent further damage.
    - <u>Examples:</u> An exterior door has been busted down - plywood is the immediate step. A new door installed is the repair, overall, the project is an emergency repair. Other time-sensitive projects include a non-functional HVAC in winter, a hole in the roof, no running water, no electricity from dangerous wires/boxes.
    - Provides $5k-10k for one emergency repair by a subcontractor
    - Bidding required
- **Critical Repairs –** Core utility repairs, safety (windows, doors, locks), accessibility repairs for safe mobility, and exterior repairs (siding, gutters) These are things that cause difficulty with daily tasks and living in the home.
    - Provides $5k-10k for one critical repair by a subcontractor
    - Bidding required
- **Weatherization and Energy Efficiency –** Small energy-efficiency upgrades and home improvements that reduce utility costs and improve comfort.

- Example: Air sealing around doors and windows, heating pipe insulation and HVAC repair/updates. In some cases, it could be an add-on element for a repair that's already happening, like weatherstripping a replacement door.
- Provides $500 to $3,500 per project

- **Small Repairs –** Modest updates that improve housing quality, prevent larger issues and address minor maintenance. One-time community repair events can also qualify as small repairs.
  - Provides $500 to $5k per project
  - Competitive bidding not required

Requirements and Evaluation

- Proposals must be submitted through the IEMD grant portal.
- Proposals should include a clear plan for how the organization will distribute sufficient financial and human resources to operate within the proposed budget.
- IEMD prioritizes funding for projects that serve the following populations:
  - Homeowners and renters within the IEMD boundaries
  - Homeowners and renters earning 80% of Area Median Income (AMI) or below.
  - Seniors (age 65 and older)
  - Populations at high risk of displacement, including long-term residents in rapidly changing neighborhoods.
  - Areas where renters have high cost burden
- All projects will be scored on the following criteria:
  - Project feasibility
  - Organizational capacity
  - Prior experience of operating organizations
- Applicants must report one or more of the following metrics:
  - AMI level
  - # of housing units repaired
  - # of repairs completed
  - # of organizational partnerships developed or strengthened to address affordable housing metrics
  - Other(s):___________(share a maximum of five metrics)

Restrictions

The IEMD OOR Fund generally does not support the following:

- For-profit organizations and businesses
- Capital requests, such as building construction, renovations, equipment purchase or major repair
- Grants for individuals
- Regranting funds
- Endowment contributions

Submission and Grants Portal

Applications are accepted on a rolling basis and reviewed every calendar month
Applicants must submit all application and reporting materials using the IEMD Grants Portal. First time applicants create a user profile for their organization. Organizations already registered in the IEMD Grants Portal must update the organizational profile prior to submitting a new proposal.

For guidance on setting up an account and navigating an applicant profile, please refer to the Grants Portal 101 resource for guidance or send a request for support to [email address].
The IEMD Grants Portal allows for the submission of an organization's supporting materials, applications, financials, organizational documents, and reporting. This centralized hub provides a single platform for both IEMD staff and applicants, helping to streamline the grantmaking process and minimize duplicate information. If your organization has not applied for funds before, sign up for Grants Portal here.

Review and Notification
IEMD staff will assess each proposal based on the extent to which the project aligns with the guidelines presented in this grant guide.

IEMD staff will notify applicants about the status of their proposal within four weeks of applying for the grant. Applicants may also check the status of their applications by signing into the IEMD grant portal.

Administration
This Fund is administered by John Boner Neighborhood Centers, a lead agency of the IndyEast Economic Mobility District.
Grant awardees must:

- Electronically sign a copy of the agreement in the grant portal. This is a standard agreement and is nonnegotiable. The IEMD reserves the right to cancel the agreement if awardee makes significant changes to scope, purpose, activities, budget or timeline without obtaining permission from the IEMD grant staff.
- Comply with state and federal nondiscriminatory statutes.
- Report significant changes in the project to the IEMD grant staff.
- Acknowledge the IndyEast Economic Mobility District as stipulated in the grant agreement.
- Submit a final report (including documentation of final expenditures and cost share) at the conclusion of the project.
- Retain auditable records of IEMD grant funds

Grant Disbursement Policy
The Owner-Occupied Repair Fund provides financial support for early-stage housing project activities. To ensure accountability and timely progress, all awards are disbursed in two installments: **50% at the beginning of the grant period and 50% at the midpoint**. This summary outlines the requirements for receiving each disbursement and the expectations for grantees.

<u>Disbursement Structure:</u>

- Initial Disbursement (50%): Released at the start of the grant period after administrative and compliance steps are completed.
- Midpoint Disbursement (50%): Released once the grantee demonstrates satisfactory progress, submits required documentation, and confirms continued project feasibility.

<u>Requirements for Initial Disbursement (50%):</u>
To receive the first payment, grantees must submit:

1. Signed grant agreement
2. Administrative documents, including W-9, ACH authorization, and insurance verification (if required)

3. Approved project work plan and budget
4. Once these materials are received and verified, the first disbursement will be processed.

Requirements for Midpoint Disbursement (50%):

To receive the second payment, grantees must submit:

1. Midpoint Progress Report summarizing completed activities and progress towards milestones
2. Expenditure summary or ledger showing use of initial disbursement
3. Updated project timeline, if applicable
4. Confirmation of compliance with all reporting requirements
5. Midpoint documentation must demonstrate that the project remains feasible and aligned with program goals.

Disbursement Adjustments:

The funder may delay or withhold payment if:

- Required documentation is incomplete
- Spending is inconsistent with the approved budget
- The project is significantly delayed or noncompliant
- Activities no longer align with program goals

Closeout Requirements

At the end of the grant period, grantees must submit:

- Final Report detailing completed activities
- Final Expenditure Report confirming use of funds
- Completion of closeout requirements influences eligibility for future IEMD funding.

Application Support

Please contact IEMD staff regarding funding opportunities before submitting a proposal. Email [email address].

For guidance on setting up an account and navigating an applicant profile, please refer to the Grants Portal 101 resource for guidance or send a request for support to [email address].

IndyEast Economic Mobility District
Housing Stability Navigator Job Description

Program Overview:
The Housing Stability Navigator program is centered on preventing housing displacement for residents in the IEMD. A navigator will be placed at each IEMD lead organization (JBNC, SECS, EMCC), where they will serve as a liaison between financial coaches, legal aid partners, and landlords. The Navigator role plays a critical behind-the-scenes role in building relationships, facilitating collaboration, and developing tools and training that support successful tenancies and reduce eviction risk. The roles primary responsibilities are monitoring changes in housing programs and policies, building trusted networks of reliable landlords, and training and coaching staff to better assist residents at risk of losing housing. The navigators will meet monthly as a team to coordinate strategies and advance shared goals. Each navigator will have an on-site supervisor at their assigned community center.

Position Overview:
The Housing Stability Navigator supports housing retention and stability for renters by serving as a liaison between financial coaches, legal aid partners, and landlords. This position is not primarily client-facing but plays a critical behind-the-scenes role in building relationships, facilitating collaboration, and developing tools and training that support successful tenancies and reduce eviction risk. The Navigator also ensures all work is aligned with fair housing standards and best practices.

Key Responsibilities:
- Develop and maintain strong relationships with landlords to promote housing stability for clients.
- Collaborate with career and financial coaches to share resources and insights that enhance housing outcomes.
- Navigate landlord-tenant relationships and provide guidance on effective communication and resolution strategies.
- Partner with Indiana Legal Services' Consumer Advocacy Project (CAP) to stay informed about eviction trends and tenant protections.
- Coordinate and lead workshops on rental success, tenant rights, and eviction prevention.
- Convene landlord groups to share information, build trust, and explore ways to expand housing access for vulnerable renters.
- Create and manage a landlord database to track housing partners, unit availability, and referral pathways.
- Serve as a resource for career and financial coaches by providing expertise, materials, and training—not direct client support.
- Promote and adhere to fair housing standards in all training content, resources, and stakeholder interactions.
- Prioritize housing displacement prevention, specifically for seniors and non-white residents in the District.

Qualifications:
- Experience in housing stability, property management, tenant advocacy, or community development.

- Strong understanding of eviction processes, fair housing law, and landlord-tenant dynamics.
- Proven ability to develop partnerships and coordinate across multiple stakeholders.
- Excellent organizational and communication skills, especially in facilitating trainings and managing data systems.
- Comfortable working in a behind-the-scenes capacity with occasional facilitation duties.
- Bachelor's Degree in a relevant humanities, social science, business administration, social work, psychology, sociology, counseling, or related service/science disciplines preferred.
- Degree may be substituted for three (3) years of work experience in a social service and/or human service field, business administration, or experience involving engagement with landlords or property managers, in real estate, or conducting appropriate connections of individuals, especially those experiencing homelessness, to housing services.
- One year of experience involving engagement with landlords or property managers, in real estate, or conducting appropriate connections of individuals, especially those experiencing homelessness, to housing services.
- Individuals with lived experience are encouraged to apply.

Success Indicators
First 90 days expectations:

- <u>Organizational immersion:</u> Learn the company's mission, values, and structure. Understand how your role supports the larger team and agency goals.
- <u>Team integration:</u> Build relationships with key stakeholders, including your manager, case managers, and other team members, to understand workflows and expectations.
- <u>Program and resource knowledge:</u> Gain a comprehensive understanding of housing support programs within the IEMD and federal, state, and local regulations, application procedures, and eligibility requirements. This includes specific programs like Housing Choice Vouchers, Rapid Re-Housing, and Permanent Supportive Housing.
- <u>Systems and documentation:</u> Master internal and external tools and technologies, including databases like the SharePoint, HomeNow and Padmission to accurately track client data and progress.
- <u>Landlord outreach:</u> Begin outreach to landlords and property managers to promote the organization's programs and build new housing opportunities for clients.
- <u>Housing search:</u> Proactively search daily for housing units and connect with landlords regarding available listings. This may include visiting properties.

Each organization can add success indicators for the position that best meets their needs.

Each organization can restructure this job description to fit formats, structures, and wording that they use for other job postings.

Community Conditions and Rationale for Action

Martindale-Brightwood is a historic neighborhood that continues to experience the cumulative effects of long-term disinvestment and housing instability. Neighborhood-level data drawn from the Martindale-Brightwood Quality of Life Plan and related local analyses indicate that approximately 42 percent of households are owner-occupied, meaning the majority of residents are renters. This renter-heavy housing market increases vulnerability to displacement and frequent residential moves, particularly for families with children.

The neighborhood's housing stock is significantly older than the citywide average. Fewer than five percent of homes have been built in the last twenty years, and many existing units require substantial repair or rehabilitation. Vacancy rates have historically been more than twice the Marion County average, contributing to housing instability, blight, and safety concerns.

In recent years, rising home values and increased investor ownership have further constrained affordability for long-term residents. While new construction and rehabilitation activity have increased, these investments have not consistently benefited low-income families, particularly those seeking stable, family-sized rental housing near neighborhood schools.

Housing instability directly affects children and families in the Martindale-Brightwood area. Research and local experience indicate that frequent residential moves are associated with chronic absenteeism, academic disruption, and social-emotional stress among students. For families, housing instability often coincides with transportation challenges, food insecurity, and inconsistent access to school-based and community supports. These conditions were a driving force behind the creation of the Martindale-Brightwood Education Zone (MBEZ), which recognizes that improving educational outcomes requires addressing the conditions that influence learning beyond the classroom.

Housing Strategy Overview

The MBEZ Housing Village is a place-based collaborative focused on improving educational outcomes by addressing conditions beyond the classroom. EMCC serves as an anchor partner within MBEZ and leads the implementation of the Housing Village strategy. During the initial implementation phase, the Housing Village will focus exclusively on families with children enrolled in KIPP Indy Public Schools. This focus enables close coordination with school-based supports, consistent monitoring of student mobility and attendance, and testing and refining the model before potential expansion.

The core objective of the Housing Village is to increase the supply of stable, affordable rental housing in Martindale-Brightwood, complemented by the social, educational, and financial supports EMCC already provides to families.

Housing Delivery Approaches

To expand the supply of affordable rental housing in the neighborhood, EMCC will pursue two complementary acquisition and rehabilitation strategies.

First, EMCC will seek to acquire and rehabilitate an existing apartment building in the Martindale-Brightwood area. Apartment-scale housing enables EMCC to efficiently serve multiple families, integrate on-site supports where appropriate, and serve as a visible anchor for the Housing Village model.

Second, EMCC will pursue the acquisition and rehabilitation of scattered-site single-family or small multifamily homes. Scattered-site housing offers flexibility, allows families to remain embedded in the neighborhood, and expands affordable housing options in areas where apartment-scale development may not be feasible.

Together, these approaches allow EMCC to respond to market conditions, manage risk, and incrementally increase the supply of affordable rental housing while maintaining close alignment with school-based supports.

Pre-Development and Implementation Approach
The Housing Village is a structured early-action housing strategy that integrates property acquisition, rehabilitation, and ongoing family-stabilization supports. EMCC intends to pursue property acquisition in the first year of implementation, using flexible and philanthropic capital to secure and rehabilitate affordable rental housing.

EMCC will continue to deliver its full range of education, financial, and family supports alongside housing activities. A detailed capital and operating budget will be developed after property identification and due diligence to ensure alignment with the acquisition strategy, rehabilitation scope, and long-term sustainability.

The MBEZ Housing Village reflects EMCC's strategic commitment to strengthening housing stability as a foundation for educational success. By aligning organizational priorities with the Martindale-Brightwood Quality of Life Plan and the goals of the Martindale-Brightwood Education Zone, EMCC is well-positioned to play a more active role in creating affordable rental housing while continuing to support families and children through integrated, place-based services.

MBEZ Housing Village

Goal: Creation of 12 rental residences for families attending KIPP Indy

Sources	
IEMD Funds	$ 1,500,000
UWCI Capital Fund	$ 1,500,000
Other private funding	$ 1,000,000
Other sources	$ 220,720
Total	**$ 4,220,720**

Expenses	
Acquisition	$ 300,000
Construction / rehab (12x $252k/unit)	$ 3,024,000
Contingency (10%)	$ 302,400
A/E / scope development (6%)	$ 181,440
Permits & Fees	$ 7,500
Insurance (2%)	$ 60,480
Security	$ 20,000
Development Consultant	$ 150,000
Legal	$ 25,000
Accounting	$ 7,500
Holding costs / lease up reserve	$ 18,000
Operating Reserve	$ 50,000
Reserve & Replacement ($6k/unit)	$ 72,000
Developers Fee (10%)	$ 302,400
Total	**$ 4,220,720**

IndyEast Economic Mobility District
Opportunity Savings Program Framework

Introduction

The Opportunity Savings Program (OSP) is a privately funded Individual Development Account (IDA) initiative designed to help individuals and families build financial assets and achieve long-term economic stability. Through matched savings and financial education, participants can work toward meaningful goals such as homeownership, education, small business development, or financial resilience.

This program is a direct response to data driven needs identified in the 2025 Eastside Economic Mobility District Housing Study, conducted by Community Scale. These needs include homeownership affordability gaps, renter-to-owner transitions, and asset-building for vulnerable populations (seniors, minorities, cost burdened renters). More than half of the district's residents are renters (53%), and many fall below 80% of the Area Median Income (AMI), which is the target participants for this program. The study notes that the affordable home price for a median-income household is approximately $286,765, yet saving even a 3% down payment (nearly $8,600) is unattainable for many without structured financial support. An IDA program would directly address these disparities by helping residents build savings toward homeownership, emergency needs, or critical housing repairs.

The IDA program promotes economic mobility by helping residents build assets for long-term stability through matched savings and financial resilience. The program will help ensure vulnerable populations are loan-ready and can unlock opportunities provided through other products included in this proposal. By bridging housing access, entrepreneurial and workforce investment, and asset development, the program strengthens all three pillars of the grant: economic development, housing, and workforce development.

Program Goals

- Promote economic self-sufficiency and financial empowerment.
- Encourage savings and asset-building among low-to-moderate-income individuals.
- Provide a flexible alternative or supplement to state-administered IDA programs.

Eligibility Criteria

- **Age:** Must be a legal adult (18+) or an emancipated minor.
- **Geography:** Must be a client of an IEMD community center. Priority will be given to those who reside within the designated service area of the IEMD.
- **Income:** Household income must be at or below 80% of the Area Median Income (AMI).
- **Engagement Participation:** Must complete application, participant agreement, and program orientation.
- **Repeat Participation:** Former OSP and IDA participants may be eligible for re-selection.
- No employment requirement.
- No requirement to receive government assistance.

Program Structure: Two-Part OSP Model

The Opportunity Savings Program (OSP) includes two progressive savings tracks:

Part 1: Emergency Savings Account (ESA)

- Designed to help participants build a short-term financial cushion to meet long-term goals.
- Participants save $500 with a 1:1 match.
- Total possible funds: $1,000 (participant + match).
- Funds should be used for emergencies, including car repairs, medical bills, housing stability, or other urgent needs. Documentation is not required.
- Participants must complete at least 3 hours of financial education to access ESA match.
- Early withdrawals of unmatched funds are allowed if they are redeposited within 12 months of the original withdrawal. These withdrawals do not include matched funds.

Part 2: Individual Development Account (IDA)

- Available only to participants who complete Part 1 (the Emergency Savings Account).
- Participants may save up to $2,500 with a 3:1 match.
- Total possible funds: $10,000 (participant $2,500 + match $7,500).
- Funds must be used toward approved asset-building goals such as homeowner readiness, post-secondary education, or small business start-up.
- Participants must complete an additional 6 hours of financial education focused on asset-building specific to their goals.
- Emergency withdrawals of unmatched funds are allowed if they are redeposited within 12 months of the original withdrawal. Emergency withdrawals do not include matched funds.

Acceptable Savings Goals: Participants may use their matched OSP savings for the following approved purposes:

- Homeowner Readiness
  - Closing costs and downpayments on a first home
  - Earnest Money
  - Appraisal fees
  - Inspection fees
  - Property survey
  - Principal payments if IDA funds were used to purchase the home
  - Necessary homeowner repairs and renovations
    - Can be used energy efficiency repairs and safety modifications
    - For renovations, there is a threshold of $400 minimum for an item to qualify and items must be a permanently attached asset
- Education
  - Accredited post-secondary education
  - Accredited vocational training
- Small Business Support
  - Small business start-up costs (i.e. obtaining an LLC, building a website, onboarding staff)
  - Small business expansion costs (i.e. staff training, purchase of business supplies, increasing stock production)
  - Business expenses must be reasonable for their industry
    - Does not include rent or employee pay

Savings Mechanism

- Participants open a savings account at a partner financial institution or program-approved bank.
- Funds must be deposited regularly (monthly or quarterly).
- Match funds held in separate, restricted custodial account.
- Direct deposit from paycheck or another account is recommended but not required.
- Deposits usings physical checks will be accepted

Disbursement of Funds

- Once $500 has been put into the Emergency Savings Account (ESA), the Part 1 funds will be distributed directly to participants. Documentation for ESA expenses is not required.
- IDA funds disbursed directly to vendors (e.g., school, landlord, contractor).
- Participants must submit documentation of intended purchase (invoice, estimate, etc.) for Part 2 funds.

Financial Education Requirements

- Part 1: Minimum of 3 hours standardized financial education covering emergency budgeting, savings habits, and financial planning.
- Part 2: Additional 8 hours covering budgeting, credit, asset planning, and specific goal-focused training.
    - Housing: 8 hrs. of homeowner training lead by a HUD certified housing counseling agency
    - Education: 8 hrs. of job readiness training at the community centers and/or time logged with career/financial coaches
    - Small Business: 8 hrs. of training through small business support organizations and micro-enterprise training
        - BOI and SCORE

Program Timeline

Part 1: Emergency Savings Account

- Participants must deposit funds monthly or quarterly. Missing 3 deposits may result in termination from the program.

Monthly deposits	$41.67/month
Quarterly deposits	$125.00/qtr.

- While regular deposits are expected, participants can make lump sum payments as well.
- Participants have up to 12 months to complete their emergency savings goal. Once they have completed their savings goal, participants may immediately access the $1,000 of saved and matched funds.

Part 2: Individual Development Account

- Participants must deposit funds monthly or quarterly. Missing 3 deposits may result in termination from the program.

Monthly deposits	$69.44/month
Quarterly deposits	$208.33/qtr.

- While regular deposits are expected, participants can make lump sum payments as well.

- Participants have up to 36 months (3 years) to complete their savings goal. Once they have completed their savings goal, participants have up to 12 months to use the $10,000 of saved and matched funds.
- Extensions may be granted for documented hardship or major life events.
- Quarterly check-ins required with program staff.

Program Administration

- The OSP is administered by John Boner Neighborhood Centers.
- Staff are responsible for intake, participant support, financial education coordination, and disbursement processing.
- Regular reporting and recordkeeping will ensure accountability and program integrity.
- JBNC will use Home Keeper CRM or ETO (TBD) to track and manage accounts

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Funding Source

The Opportunity Savings Program is supported entirely through private donations, grants, corporate sponsorships, and philanthropic partnerships.

Modifications and Exceptions

- The program may adjust rules or requirements based on funding levels or community needs.
- Exceptions to policy must be approved in writing by the Program Director.

This manual is a living document and may be updated periodically to reflect program improvements or policy changes.

INDYEAST ECONOMIC MOBILITY DISTRICT

Capacity Building Report

Prepared by Community Solutions, Inc.

September 2025

Updated January 2026

Through the support of a planning grant from the Lilly Endowment Inc., Community Solutions, Inc. was engaged to perform organizational assessments and develop capacity-building plans for housing-related non-profit organizations serving the IndyEast Economic Mobility District. Non-profit organizations that had been actively operating affordable housing development programs within the district over the previous five years were invited to participate at no cost to the organization.

Seven organizations in the IndyEast Economic Mobility District participated in a process to identify the capacity-building needs most essential to their long-term success. Each organization was paired with an individual coach throughout the process.

The seven participating organizations included: **Edna Martin Community Center, Englewood Community Development Corporation, Home Repairs For Good, John Boner Neighborhood Center, Martindale-Brightwood Community Development Corporation, Near East Area Renewal, and Shepherd Community Center.**

Through a shared assessment process, each organization determined which investments would have the most significant impact on its ability to serve the community. In addition to the summary below, each organization was provided with an individualized capacity building plan to inform its decision-making. The collective result, summarized here, is a diverse portfolio of capacity-building projects that are organization-specific and collaborative at the economic mobility district level, requiring over $1,900,000 in investment over the next three years.

The array of projects focuses on building the infrastructure, systems, and culture that will enable these community-based organizations to thrive for years to come, allowing them to concentrate on delivering a more profound, more sustainable impact.

Each participating community organization addresses complex social challenges. Yet, they often lack the resources to build the internal strength needed to enhance their work and support their staff. By allowing the organizations themselves to define their capacity-building priorities, this approach ensures that funding aligns with real, pressing needs rather than one-size-fits-all solutions.

The projects represent a rare opportunity to invest not only in programs, but in the core capacities that make programs possible—from staff retention and leadership culture to data systems that support the ability to demonstrate impact. These investments enable organizations to become stronger stewards of resources and more effective change agents in the community.

Summary of Priorities Across Organizations

When asked to describe their priority capacity-building needs that would most strengthen their impact, the seven organizations identified the following priorities:

- **Technology and Evaluation Systems (7 projects):** Investments in integrated data systems, dashboards, and evaluation frameworks to demonstrate outcomes and drive decision-making.
- **Operational & Business Planning (9 projects):** Addressing board development, staffing systems, communications strategies, and group health insurance—critical supports that strengthen organizational foundations and/or ensure long-term stability and accountability.
- **Program Expansion (3 projects):** Efforts to test, design, and launch new services that respond to emerging community needs.
- **Organizational Culture and Retention (3 projects):** Initiatives to build staff engagement, alignment, and resilience.

Capacity Building Priorities: Leadership, Networking, and Collaboration

In addition to organizational-specific capacity needs, organizations were also asked about activities across the entire community in which collaboration and shared experiences occur. In response, organizations voiced common themes about what would strengthen their work and increase their long-term impact at a community network level. They were asked specifically about three interconnected areas of capacity building: leadership coaching, peer networking, and collaborative partnerships. A summary of their responses outlines a picture of organizations that are committed to growth, but also clear-eyed about the need to be an authentic and committed partner.

Leadership Coaching: Building Confidence and Skills

There is a strong interest in leadership coaching at all levels, particularly for emerging leaders and program managers stepping into supervisory roles. Many of these individuals are highly skilled in their areas of service delivery but have had little formal training in people management. While some have participated in online workshops, leaders expressed a desire for deeper, more personalized coaching that could guide them through the day-to-day realities of building and leading effective teams.

One suggested approach that emerged is pairing leadership development with tools like strengths assessments, then offering hands-on coaching that translates assessment results into practical strategies. This type of investment would help managers not only understand their own leadership style but also learn how to create cohesive, motivated teams. By equipping mid-level staff with these skills, organizations can both improve current operations and strengthen their leadership and career pipeline for the future.

Peer Networking: Creating Space for Shared Learning

Peer networking opportunities are unevenly distributed across roles. Executives and external-facing staff often have access to convenings and collaborative networks, but many other staff do not. Property managers, finance professionals, case managers, youth workers, and financial coaches often have limited outlets to connect with peers in similar positions at other organizations. This lack of connection can leave staff feeling isolated and without access to the collective problem-solving and idea-sharing that is so valuable in nonprofit work.

Respondents emphasized the transformative potential of creating spaces where peers from different organizations can gather, share challenges, and exchange solutions. Leaders of small- to mid-sized nonprofits noted that these opportunities provide not only practical strategies but also a sense of solidarity and encouragement. For staff on the front lines, peer networking could foster innovation, reduce burnout and turnover, and create stronger professional communities across the city.

Collaboration: Expanding and Deepening Partnerships

Collaboration emerged as a defining strength and an ongoing priority. Organizations described their current partnerships as diverse, encompassing collaborations with affordable housing providers, community-based agencies, and faith-based networks. Many view these relationships as crucial to addressing the diverse needs of the community.

There is also an eagerness to expand current collaborations —particularly in areas such as workforce development and affordable housing. With a more intentional strategy for joint efforts, organizations will be better positioned to secure the necessary funding and resources.

Respondents noted that by building stronger partnerships, they can share resources, coordinate services, and collectively advocate for systemic change. In this way, collaboration is not just an operational strategy but also a core value that shapes how these organizations approach their missions.

A Unified Vision for Growth

Together, these perspectives illustrate a sector that is both reflective and forward-looking.

- **Leadership coaching** can prepare the next generation of managers and executives for success.
- **Peer networking** can break down silos and build communities of practice.
- **Collaboration** can magnify impact and create pathways for more coordinated, sustainable change.

For funders and partners, these priorities present clear opportunities to invest in efforts that will have a ripple effect across organizations and communities. Strengthening leaders, fostering peer exchange, and deepening collaboration can help ensure that nonprofits are equipped not only to meet immediate needs but also to drive long-term, systemic progress.

Recommendations

Based on the organizational assessment and capacity planning process, the following capacity-building approaches and activities implementation proposal:

- **Organization-specific projects** identified by each partner entity to address unique needs and priorities.
- **Collaboration projects** within the economic mobility district, involving all organizations or a subset of organizations to support collective impact.
- **Leadership development strategies** focused on targeting emerging leaders across all partner organizations to strengthen future capacity.

Organization Specific Capacity Building

The chart below summarizes the organization-specific capacity-building projects that the six organizations prioritized as a result of the capacity-building assessment process. There are eighteen projects, ranging from program-related initiatives to operations and technological improvements, totaling $1,022,500. The estimated costs are based on actual quotes obtained by organizations and projected costs derived from current market costs for similar projects.

Table 1. Organization-Specific Capacity Building

Category Description	Number of Projects	Total Estimated Cost
Program Expansion & Innovation: Seed new program design and testing that responds to emerging community needs.	3	$55,000
Organizational Culture & Retention: Implement initiatives that improve staff engagement, resilience, and workplace culture, with a focus on reducing burnout and turnover.	3	$135,000
Operational & Business Planning: Invest in board development, communications strategies, and staffing systems that ensure long-term organizational stability. Support shared or group health insurance initiatives that can help retain staff and improve organizational sustainability.	9	$320,500

Technology and Evaluation Systems: Design and implement integrated data systems, dashboards, and evaluation frameworks that help organizations measure outcomes, demonstrate impact, and strengthen competitiveness for future funding.	7	$512,000
Estimated Total Cost	**22**	**$1,022,500**

Collective Collaboration Capacity Building

This category of capacity building focuses on economic district-wide collaborations, engaging all partners or a subset of partner entities that share common interests. The activities outlined in Table 2 below emerged through the capacity-building assessment or through discussions between the organizations and their coaches. In many instances, organizations expressed interest in collaboration but lacked clarity on how to proceed or which partner might align with their goals. Included below are recommended facilitation activities designed to build these connections and guide next steps.

In addition, creating and supporting structured peer networks for roles that currently lack opportunities for cross-organizational connection, such as property managers, finance staff, case managers, and youth workers, was a highlighted need. Support for regular convenings, workshops, or communities of practice emerged from the assessment process as a key strategy to reduce staff isolation, spark innovation, and encourage collaboration across organizations at all levels.

Table 2. Collaboration Capacity Building

Category Description
Convene meetings to determine the interests and priorities of community-wide collaborative efforts.
Invest in joint initiatives across organizations, such as an affordable housing strategy or shared workforce development pipelines.
Provide resources for cross-sector convening and planning that strengthen the ecosystem rather than isolating organizations.
Support collaborative pilots that can later be scaled if proven effective.
Potential shared back-office services facilitation/discussion
Create and Support Peer Networks (facilitation over two years)
Estimated Total Cost: $370,000

Leadership Development Capacity Building

Throughout the assessment process, a consistent concern emerged: the need to prepare for the next generation of organizational leaders. Some organizations anticipate the retirement of long-term leaders and are eager to ensure that their next-level staff are equipped and ready to step into leadership roles. Other organizations want to focus on reducing turnover and creating meaningful career paths within their organization to retain talent. Ideas such as coaching for emerging and mid-level leaders, particularly those new to staff supervision, were frequently mentioned. Additionally, pairing coaching with tools like Gallup Strengths Finder, DISC, or similar assessments was also mentioned as a practical strategy for building effective teams.

Table 3. Leadership Development Capacity Building

Category Description	Total Estimated Cost
Leadership development for emerging leaders (facilitation and coaching)	$120,000
Training scholarships for emerging leaders ($20,000 per organization over two years)	$140,000
Organizational Coaching ($37,000 per organization for two years)	$259,000
Estimated Total Cost	**$519,000**

Investment Recap and Timeline

Below is a snapshot of the total investment in all capacity-building activities previously described.

- Organization-Specific Capacity Building $1,022,500
- Collective Collaboration Capacity Building $ 370,000
- Leadership Development Capacity Building $ 519,000

Capacity-Building Grand Total $1,911,500

Projects could begin in the first quarter of 2026 and extend through 2028, with shorter initiatives focused on immediate improvements and longer efforts dedicated to complex system change. The staggered timelines ensure a balance between quick wins and sustainable, long-term growth.

By investing in this collective effort, funders have a clear opportunity to help fulfill more than $1,900,000 in identified and targeted capacity-building needs. The return: more resilient organizations scaling their impact, sustaining their work, and adapting to the evolving needs of the communities they serve. This is not just an investment in projects – it is an investment in people. It is an investment in the future of community leadership, long-term stability, and collective resilience.

Housing Innovation IMPLEMENTATION TIMELINE

2026 to 2031

ALL 5 YEARS

- IEMD grant portal
- MBEZ Housing Village development
- Affordable housing investment
- Predevelopment grant fund
- OOR fund
- CWF housing support
- Financial coaching
- Capacity building funds

2026

LAUNCH
- Predevelopment grant fund
- OOR grant fund
- Capacity building projects

HIRE
- Housing Stability Navigators

EXPLORE
- Eligible NMTC projects and transactions

DEVELOP
- Predevelopment components for the MBEZ Housing Village
- OSP Infrastructure

2027

PLAN
- Identify eligible projects for incorporation within the NMTC transaction

LAUNCH
- Close on the first NMTC transaction
- OSP enrollment

COMPLETE
- Predevelopment plans for MBEZ Housing Village

2028

LAUNCH
- Close on the second NMTC transaction

EXPLORE
- Additional properties & capital opportunities

BUILD
- 25 single-family homes using NMTC (transaction 1)

2029

COMPLETE
- Capacity building projects

BUILD
- The initial 25 single-family homes for the second NMTC transaction
- One new compliance home per year per NMTC transaction 1

2030

BUILD
- One new compliance home per year per NMTC transaction 1 & 2

PLAN
- Future allocations of NMTC funding for future builds

2031

COMPLETE
- Spending predevelopment grants funds
- Spending OOR grant funds
- Enrolling 180 participants in the OSP

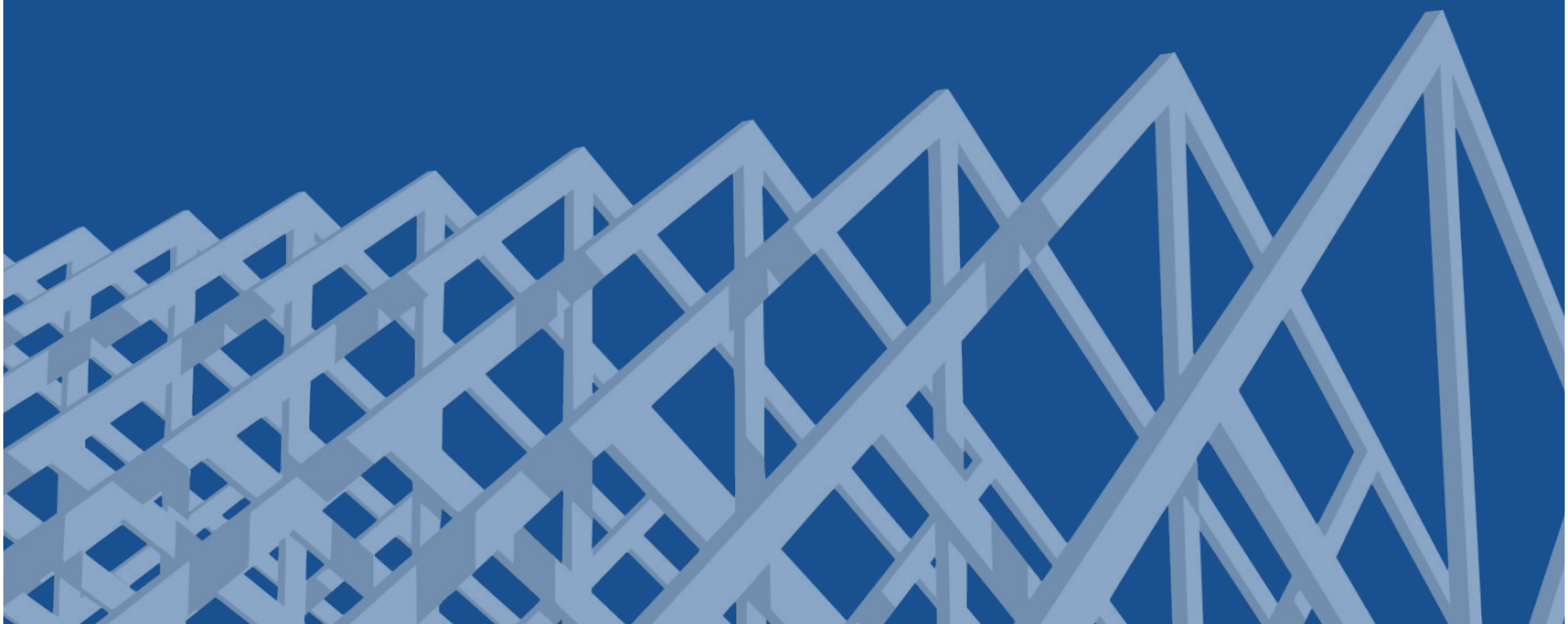
HIRE
- MBEZ Housing Village staff and begin placement planning

EVALUATE
- Housing Stability Navigators program infrastructure

CONTINUE
- NMTC transactions 1 & 2 through their compliance periods

Housing Study
Eastside Economic Mobility District

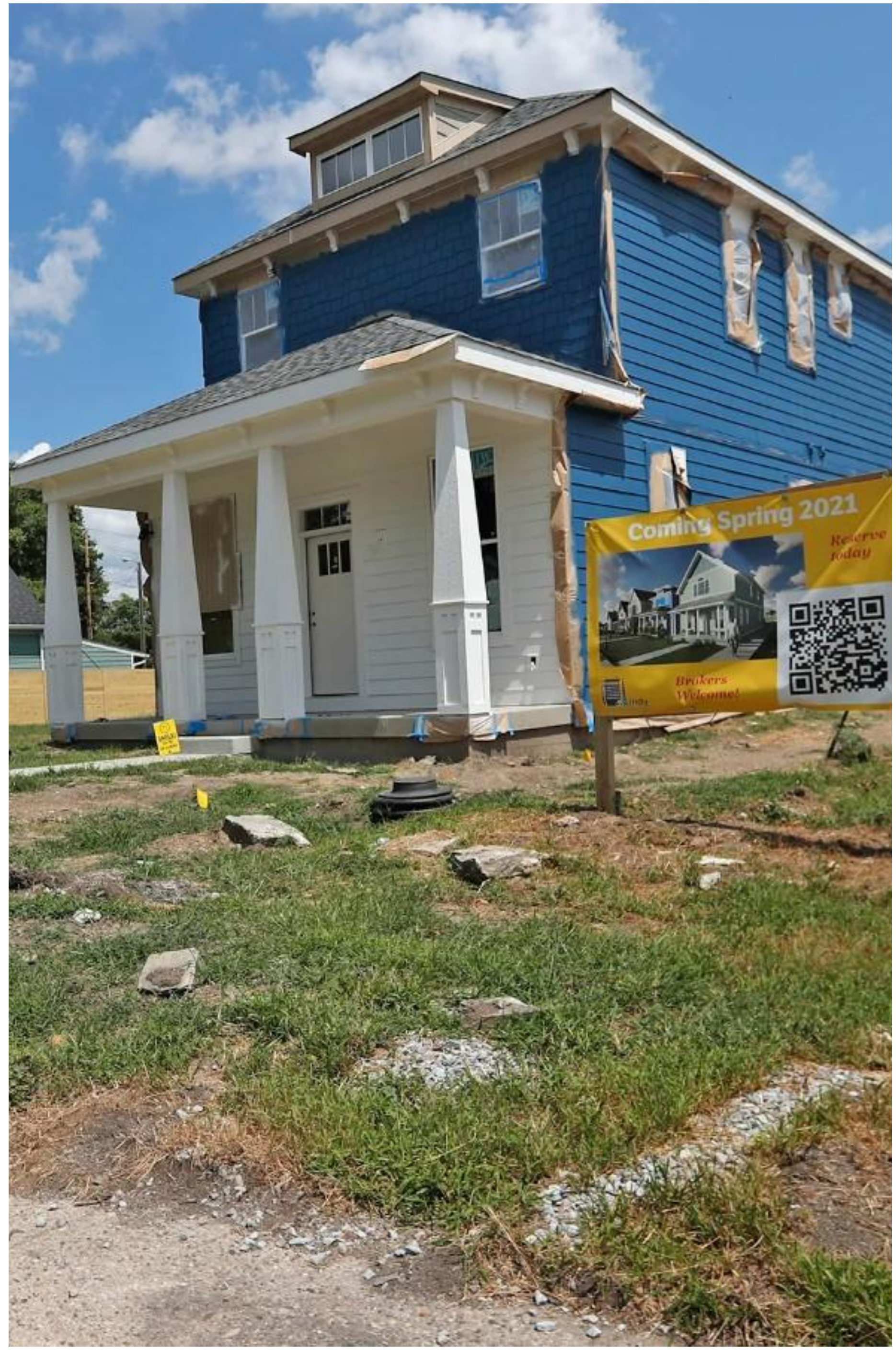
2025



INTEND INDIANA

CommunityScale

Contents



Housing Study Eastside Economic Mobility District

Intend Indiana (Intend) is a non-profit that connects people to opportunity and advances collaborative community development through equitable financing and housing solutions. Intend focuses on four main initiatives:

- Affordable HomeMatters (Housing Development)—Provides equitable and affordable homeownership opportunities.
- Build Fund (Small Business Lending)—A certified CDFI that connects underserved businesses to equitable financing.
- Edge Fund (Affordable Housing Lending)—A certified CDFI that offers flexible financing that creates equitable and affordable housing opportunities.
- Renew Landbank (Vacant & Abandoned Properties)—Partners with communities to return vacant, abandoned, and deteriorated properties to productive use.

Intend partners with community-based organizations, non-profits, foundations, banks, and state and local governments to leverage resources and deliver impactful programs designed to meet the needs of the community. Intend Indiana is a chartered member of NeighborWorks America.

CommunityScale is an urban planning consultancy focused on helping communities across the country improve equity, economic mobility, and housing attainability. CommunityScale provides a range of services and analytics products designed to help our clients make more informed and targeted decisions around policy and investment, from development opportunity assessments to zoning reviews to housing needs assessments. The firm's clients include municipalities, counties, regional planning agencies, and developers located across the country.

Overview

The purpose of this study

This study is intended to provide context and content to support partnerships and collaboration around housing opportunities, challenges, and needs in the Eastside Economic Mobility District of Indianapolis.

The study focuses on recent changes with in the district, current affordability conditions, and projections of need and potential displacement risk over the next 10 years.

Goals for this study:

Assess housing gaps and needs in the district, especially among disadvantaged and vulnerable populations.

Provide a data-driven overview to build from in future phases of analysis and collaboration with partners.

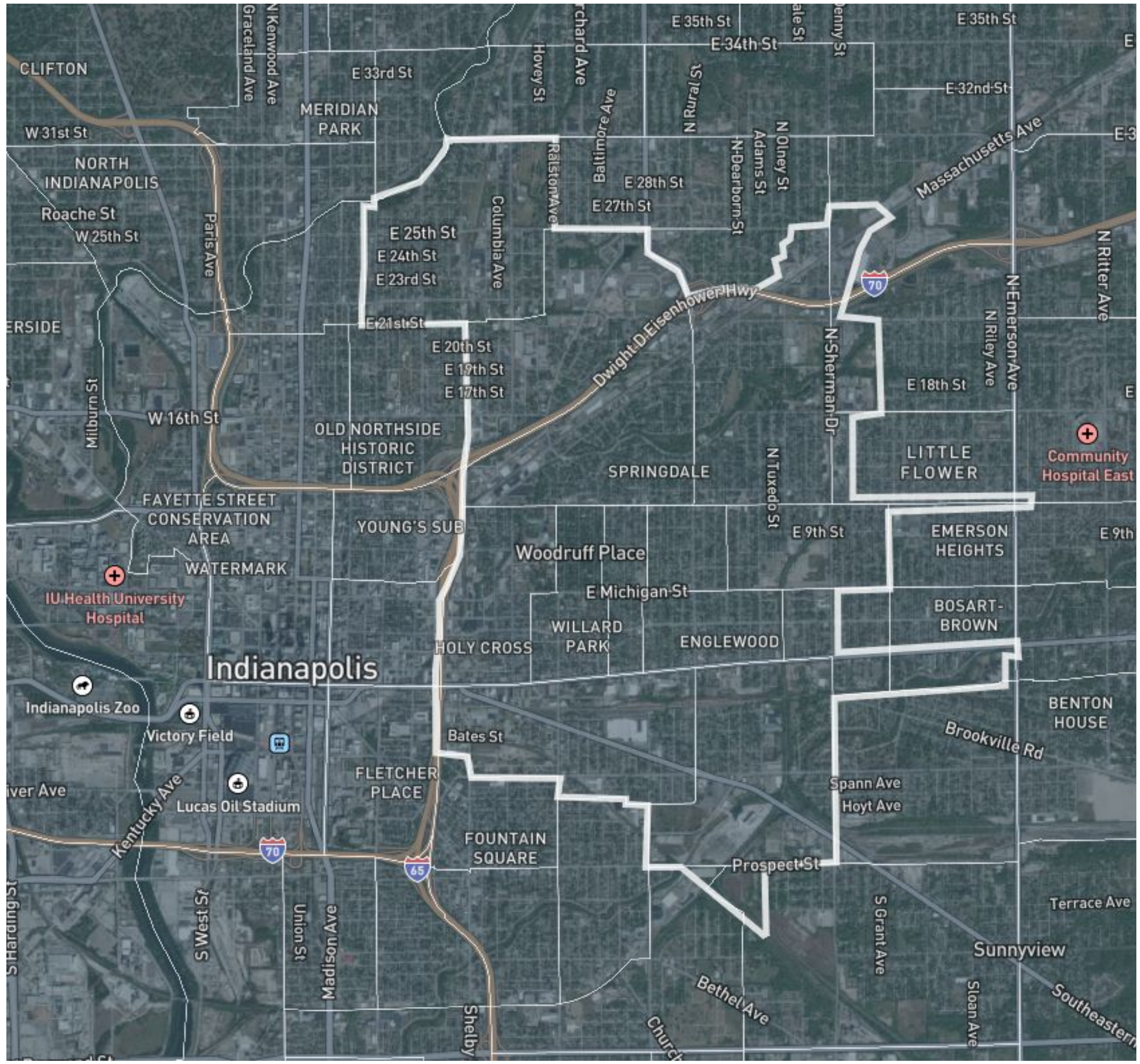
Ground dialogue and discussion about housing opportunities, challenges, and needs in the district.

Inform the preliminary development of new housing programs and initiatives in the district.

Eastside Economic Mobility District study area

The study area includes the Economic Mobility District located in and around the Near Eastside of Indianapolis.

The table below profiles select demographic characteristics of people and households within the district.



Demographic snapshot

The tables below profiles select demographic characteristics of people and households within the district.

Population and households

Total population	41,111
Total households	18,142
Median income	$51,215

Population by age

19 and below	10,447	25%
20-34	10,881	26%
35-49	8,470	21%
50-64	6,814	17%
65 and above	4,499	11%

Population by sex

Male	21,039	51%
Female	20,072	49%

Housing units by tenure

Renter-occupied	9,704	53%
Owner-occupied	8,438	47%

Population by employment status

Civilian: Employed	19,534	60%
Civilian: Unemployed	1,918	6%
Armed Forces	3	0%
Not in the labor force	10,976	34%

Population by education attainment

High school diploma or equivalent	9,107	22%
Some College	4,845	12%
Associate Degree	1,285	3%
Bachelor's Degree	4,342	11%
Master's Degree or PhD	2,824	7%

Housing study parameters

Source: Census ACS 2023 5-Year, HUD, CommunityScale

This study breaks down several indicators by income, typically in terms of percent of AMI. Additionally, the study references the median income among residents within the district.

The table at right summarizes key income and affordability characteristics for the income groups referenced in the study.

Maximum monthly housing cost refers to the amount a household can spend on housing before incurring cost burden by exceeding 30% of their monthly income, including the following factors:

- Property insurance
- Mortgage insurance (PMI)
- Property tax
- Mortgage payments

Maximum affordable matches max monthly housing cost.

Income groups and affordability characteristics

$33,200	**$66,420**	**$67,885**	**$88,550**	**$110,700**	**$132,840**	**Income (2025)**
30%	60%	61%	80%	100%	120%	Metro AMI (HUD 2025)
49%	98%	100%	130%	163%	196%	District median income (Estimate)
$2,767	$5,535	$5,657	$7,379	$9,225	$11,070	Monthly income
$830	**$1,661**	**$1,697**	**$2,214**	**$2,768**	**$3,321**	**Max monthly housing cost (30%)**
$26	$52	$61	$70	$87	$105	Property insurance (0.35% of price)
$36	$72	$85	$97	$121	$145	Mortgage insurance (0.50 of price)
$86	$172	$201	$229	$286	$343	Property tax (1.15% of price)
$682	$1,364	$1,350	$1,819	$2,274	$2,729	Affordable mortgage payment
$104,348	$208,772	$206,676	$278,412	$348,055	$417,694	Affordable mortgage (6.82% rate)
$3,130	$6,263	$6,200	$8,352	$10,442	$12,531	Down payment (3.0%)
$107,478	**$215,035**	**$212,876**	**$286,765**	**$358,497**	**$430,225**	**Max affordable home price**

Key indicators

Many can still afford housing within the district, but Indy overall is less attainable

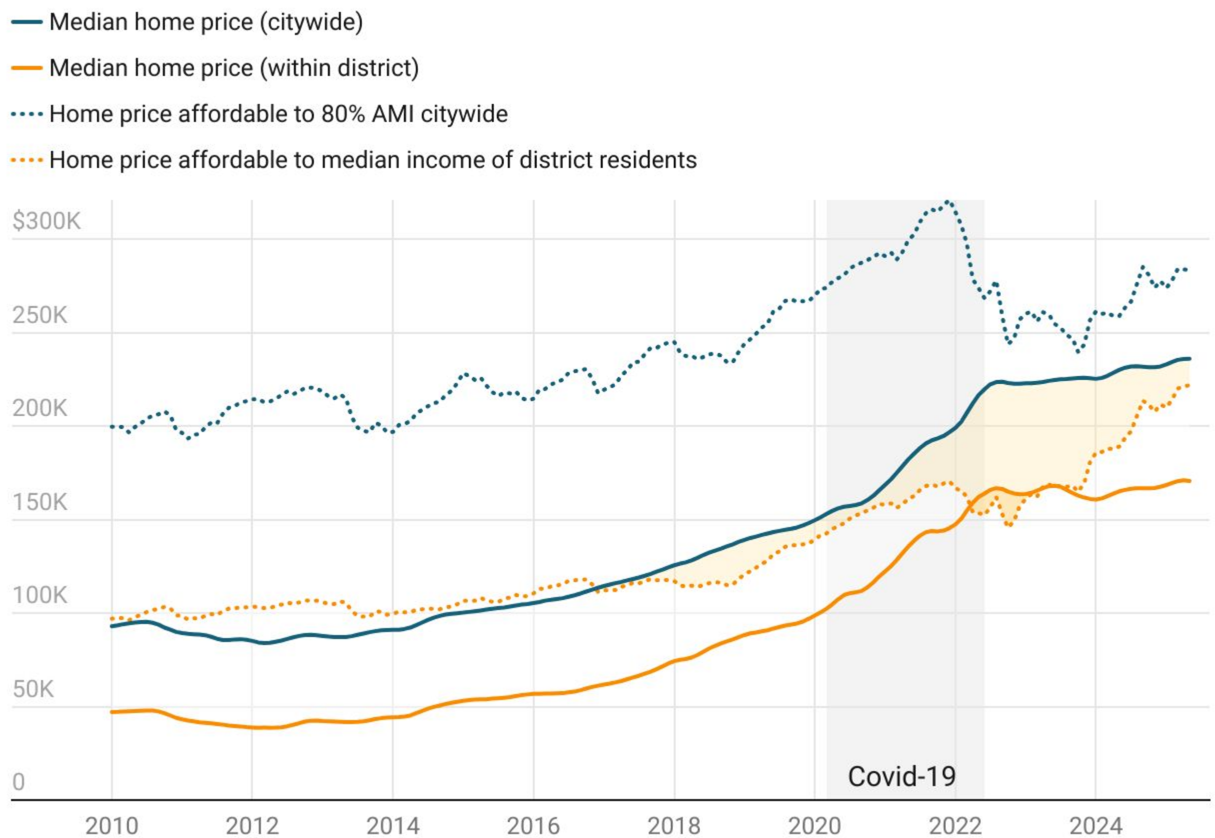
Source: Zillow ZHVI 2024, Census ACS 2023 5-Year, CommunityScale

For households earning 80% AMI, Indianapolis is relatively affordable. These households can not only afford the median home price within the district but also the median home price citywide.

Households earning the district's median income can still comfortably afford the median price within the district but they cannot afford the median price citywide without incurring cost burden.

How affordable is local housing for Eastside residents?

Comparing the median income of residents in the Eastside Mobility District with the median home price (citywide and within the district).



Affordability calculation assumes a maximum housing cost of 30% household income, including the following factors: current interest rate, 3% down payment, mortgage insurance (PMI), property tax, property insurance.

Chart: CommunityScale • Source: Zillow, Census ACS 5-year, CPI, FRED, CommunityScale

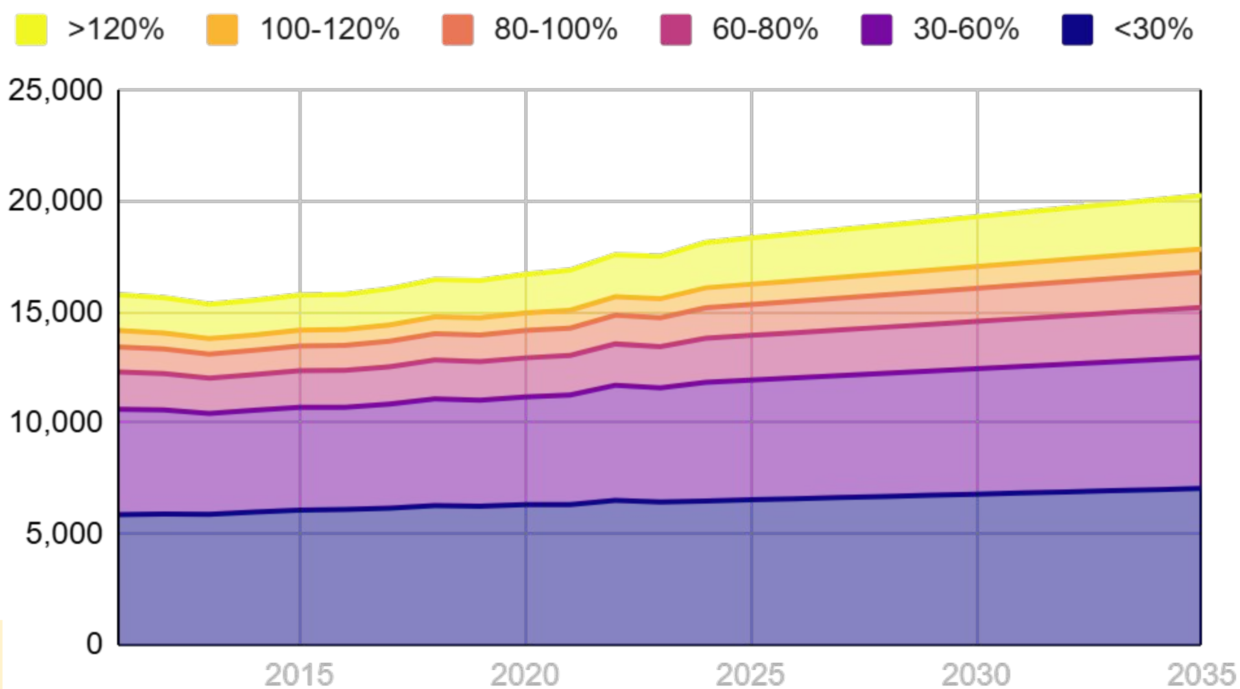
Upward pressure on incomes in recent years, projected to continue

Source: 2023 ACS 5-Year, CommunityScale, RTP

Overall incomes have been rising within the district, a trend projected to continue. The highest earning income groups are projected to grow the fastest over the next 10 years, with the rate of growth dropping as incomes drop.

Household growth by household income (% median)

Model of income trends based on 2010-2023 Census data.



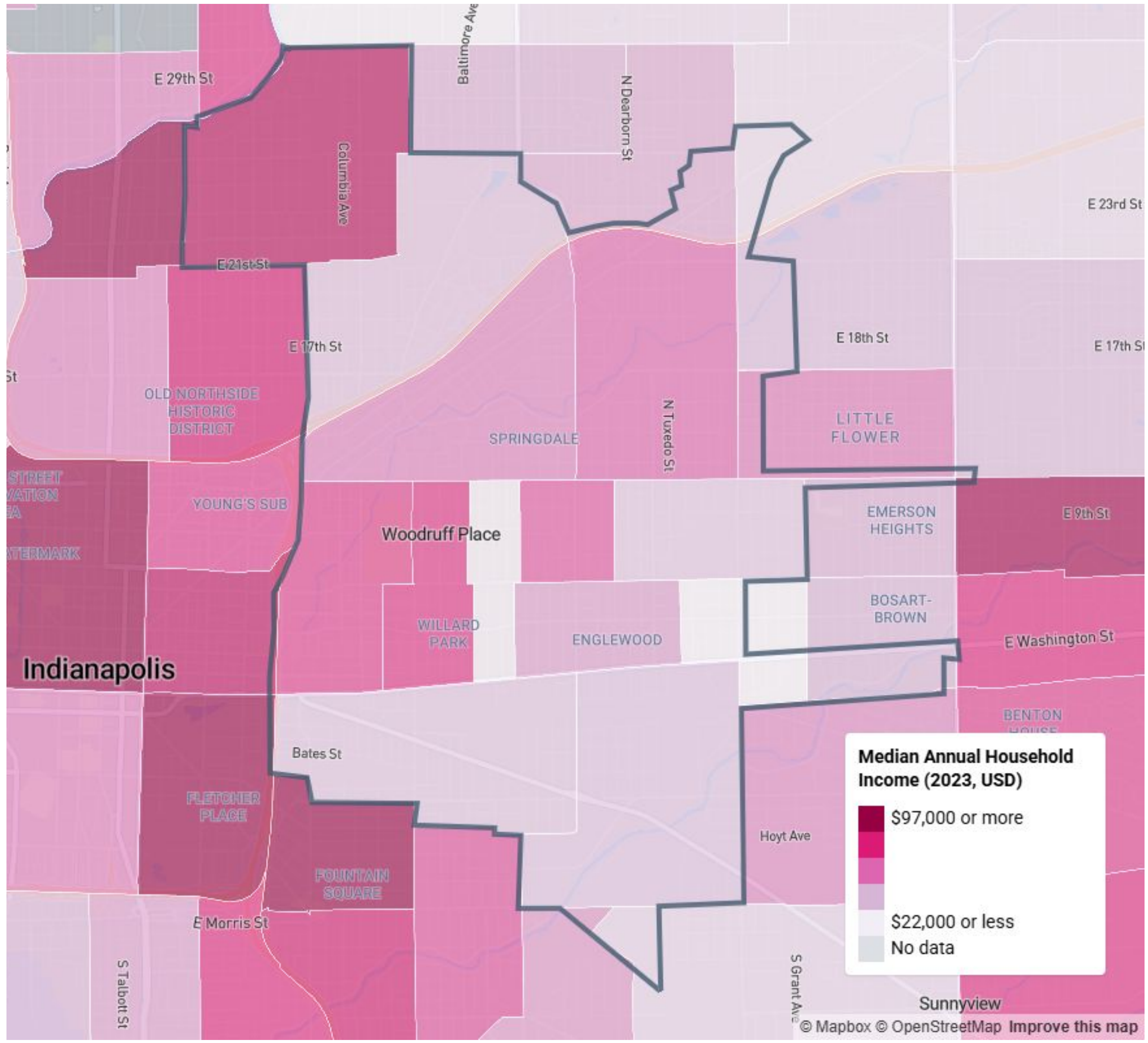
AMI Group	2025 estimate	2035 projection	Projected change	
<30%	6,591	7,109	518	7.9%
30-60%	5,453	5,956	503	9.2%
60-80%	2,031	2,275	244	12.0%
80-100%	1,412	1,606	194	13.7%
100-120%	928	1,061	133	14.3%
>120%	2,110	2,448	338	16.0%
Total	18,528	20,458	1,930	10.4%

Household incomes not evenly distributed across the district.

Source: 2023 ACS 5-Year, CommunityScale, RTP

Higher incomes are generally concentrated in the district's west and northwest.

This data can be explored on [this map](), choose the "Median Household Income" layer in the upper left.

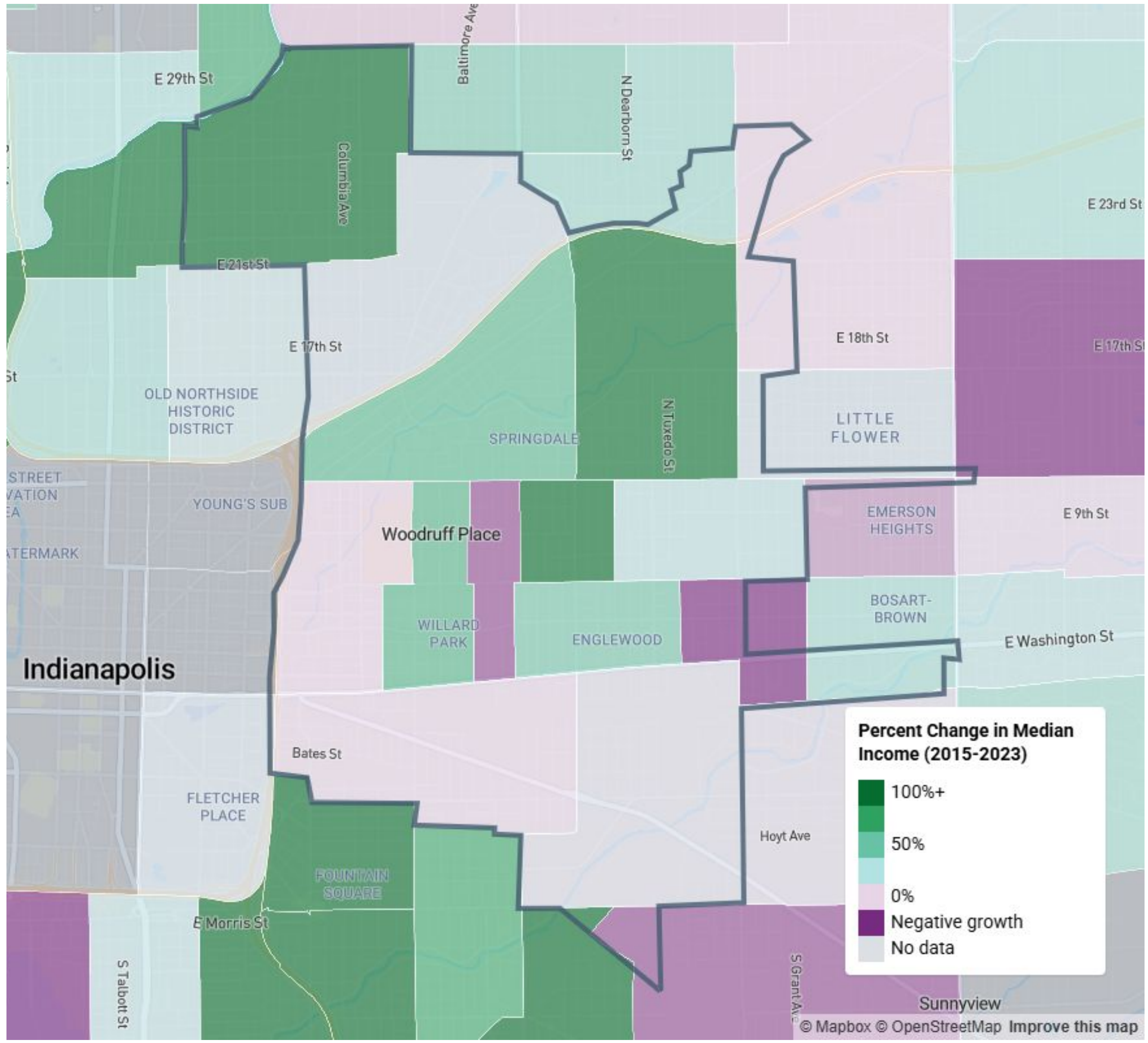


Income growth also not evenly distributed across the district.

Source: 2023 ACS 5-Year, CommunityScale, RTP

Incomes have been rising fastest in the northwest and north central portions of the district, with slow or negative income growth across the district's south side.

This data can be explored on [this map](), choose the "Percent Change in Median Income (2015-2023)" layer in the upper left.



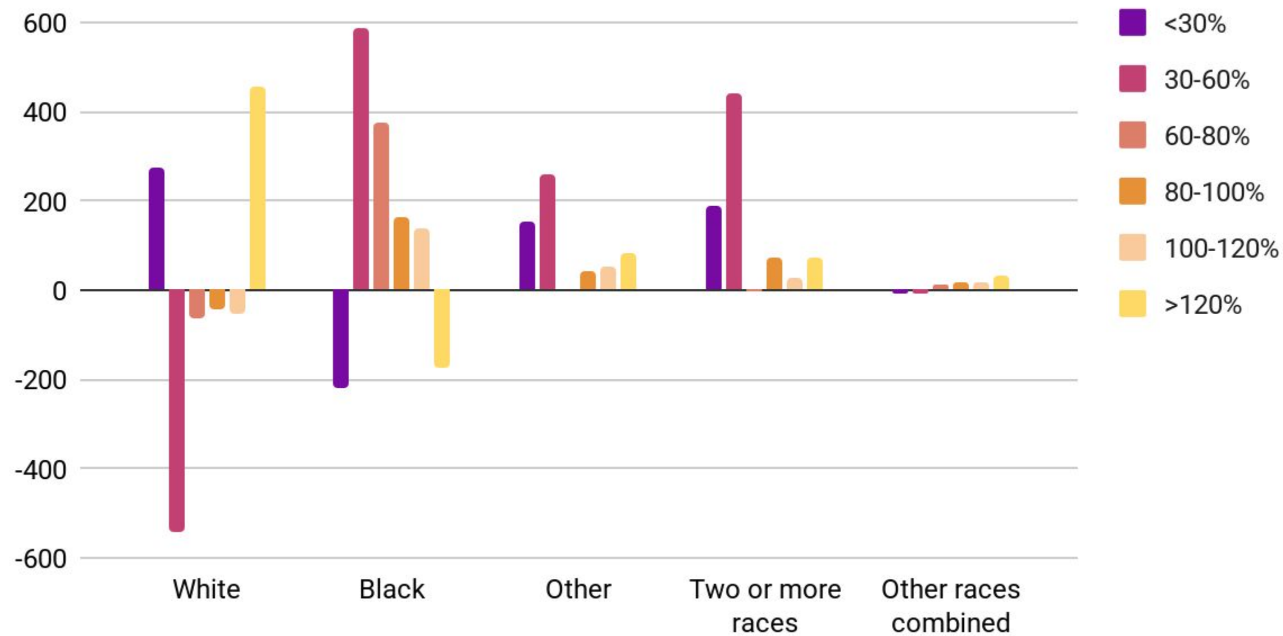
The district's income mix is changing by race

Source: ACS 5-Year, CommunityScale

Most of the growth at the 120% AMI income level is among White households. Otherwise, most growth is among Black households and those of other races.

Change in households by income and race (2015-2023)

Source: 2015-2023 ACS



Distribution of households by income and race (2023)

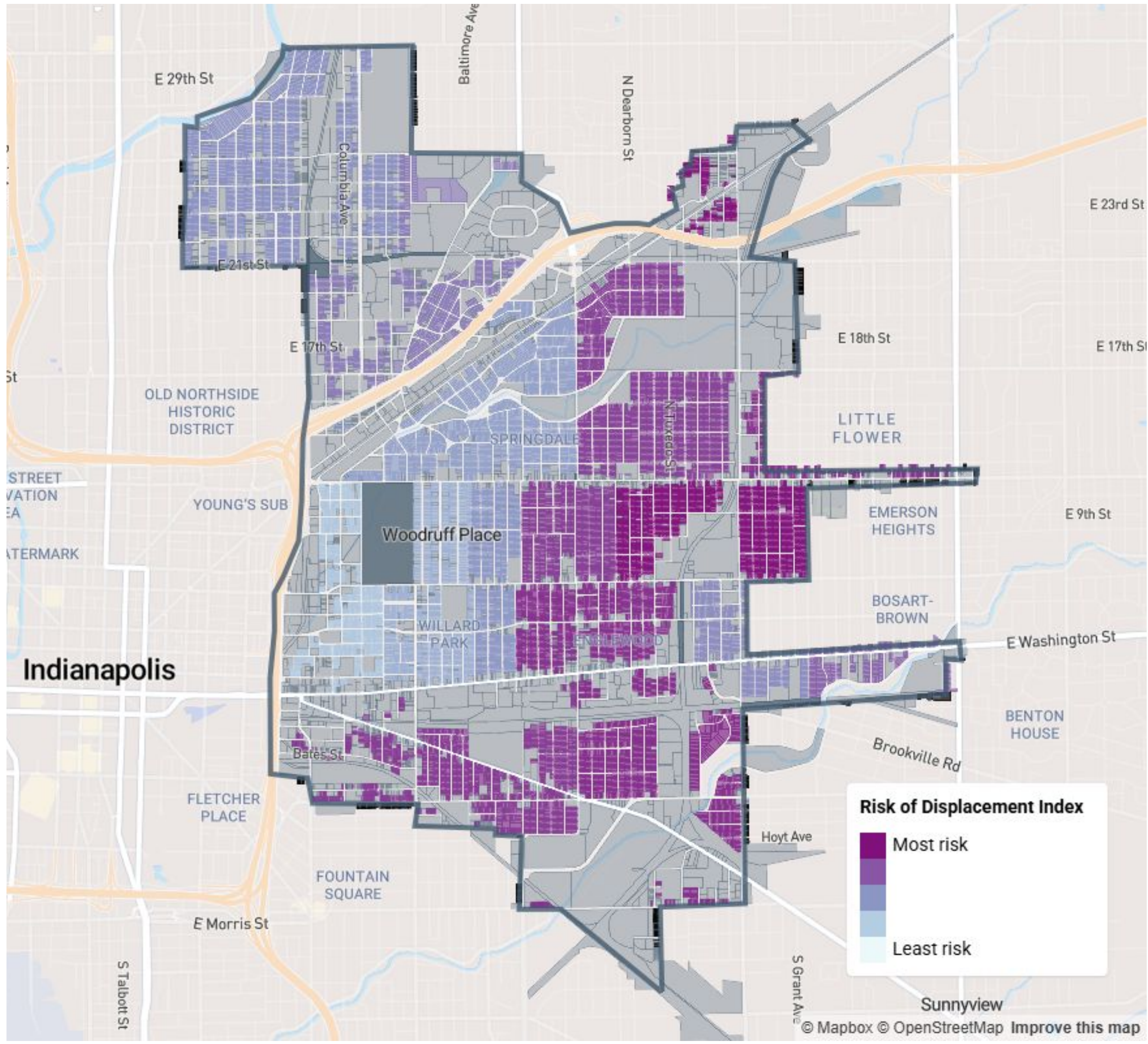
	White	*Black*	*Other*	*Two or more races*	*Other races combined*
<30%	18%	14%	1%	2%	0%
30-60%	15%	9%	2%	3%	0%
60-80%	6%	4%	0%	0%	0%
80-100%	5%	2%	0%	1%	0%
100-120%	3%	1%	0%	0%	0%
>120%	9%	1%	0%	0%	0%
Total households	**56%**	**31%**	**5%**	**6%**	**1%**

Displacement risk by race

Source: ACS 5-Year, CommunityScale

The map at right indicates areas in the district where non-white populations face relatively high risk of displacement due to market forces such as gentrification. These areas contain relatively low property values and particularly high concentrations of non-white households, especially those who have lived in their current unit for extended periods of time.

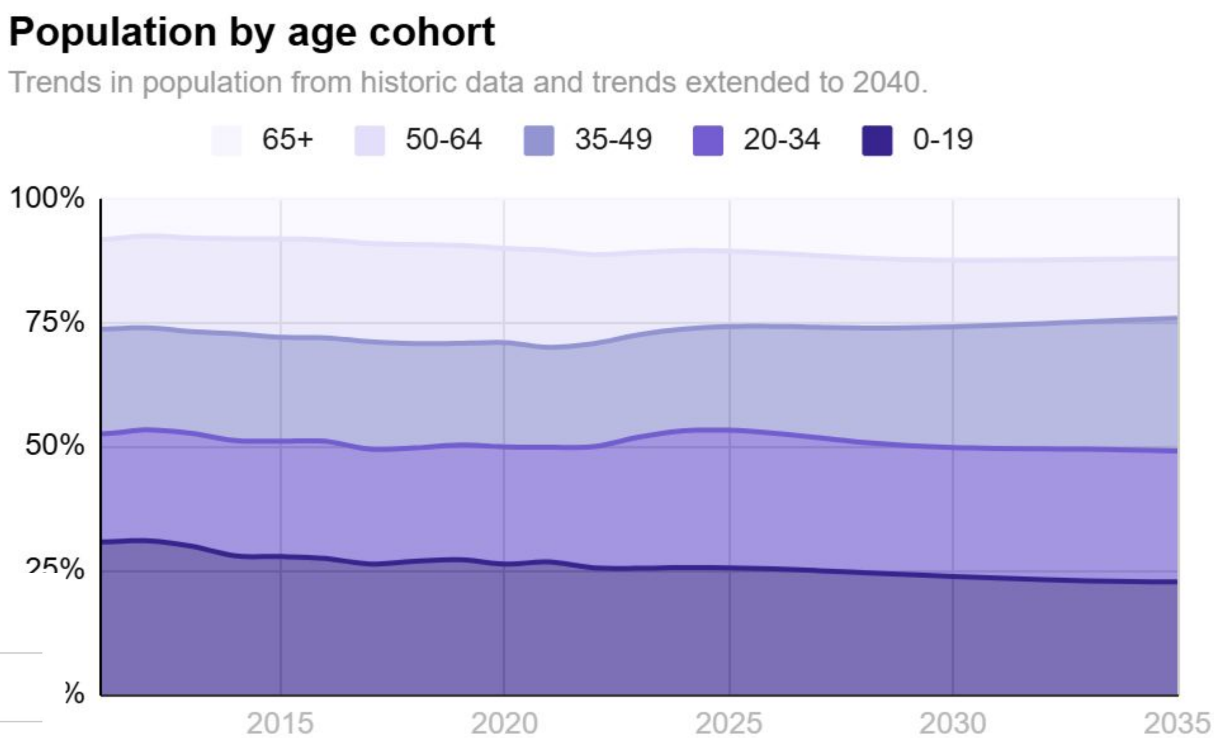
This data can be explored on [this map](), choose the "Risk of Displacement - Race & Ethnicity" layer in the upper left.

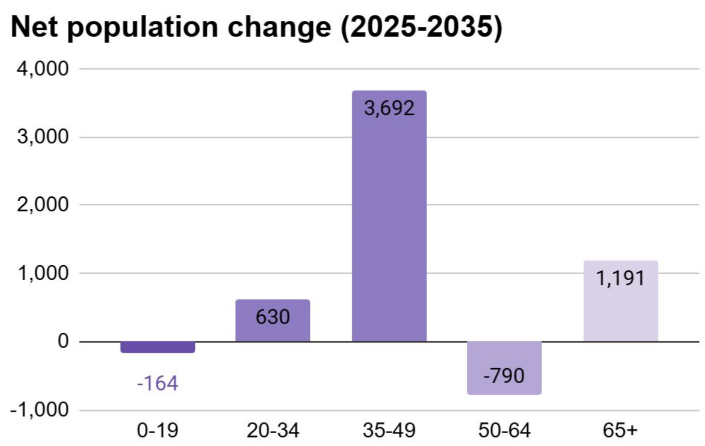


Uneven growth rates across age cohorts

Source: ACS 5-Year, CommunityScale

Income growth can at least partly be explained by the rate of growth in people aged 35-49 exceeding that of other groups (especially 0-19, 20-34, and 65+, cohorts with incomes typically lower than the 35-49 cohort).



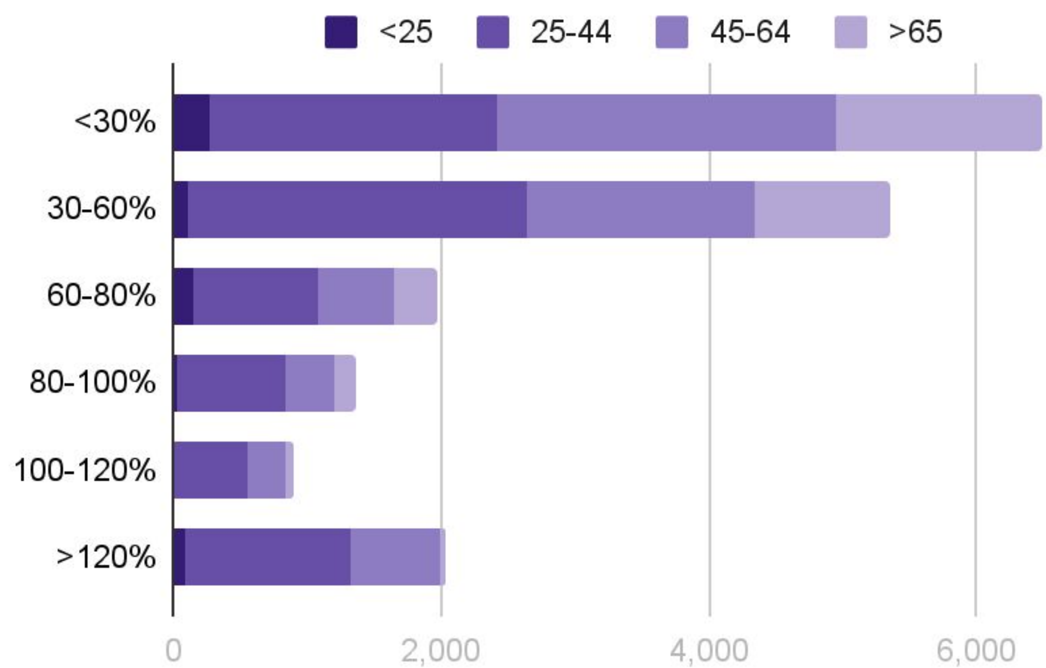


Most seniors are low-income

Sources: Census ACS 2023 5-Year; CommunityScale

While middle-age people generally span income levels, most seniors are relatively or extremely low-income. Householders aged 25-44 are generally the highest earners in the district.

Number of households in each AMI group, by age of householder



Most senior homeowners live in older housing units

Sources: City of Indianapolis; CommunityScale

Owners of 343 residential parcels took an Over 65 tax credit against their 2024 property tax bill. Of those 343, 140 parcels derived 10% or more of their assessed value from land value, an indicator of homes that may be deteriorating and in need of reinvestment.

The 2024 median assessed value for senior owned parcels stood at $99,700. Although this is higher than the median parcel value for all residential parcels ($95,600) within the Eastside Economic Mobility Zone, it falls quite short of the median assessed value for all owner-occupied parcels ($145,000) in the Mobility Zone.

These parcels' locations can be explored on this map, choose the "Construction Year" layer in the upper left and select the "Over 65 Deduction" in the upper right. Maximize "Layer Opacity" to amplify the color ramp.

Number and value of senior-occupied homeownership units by year built

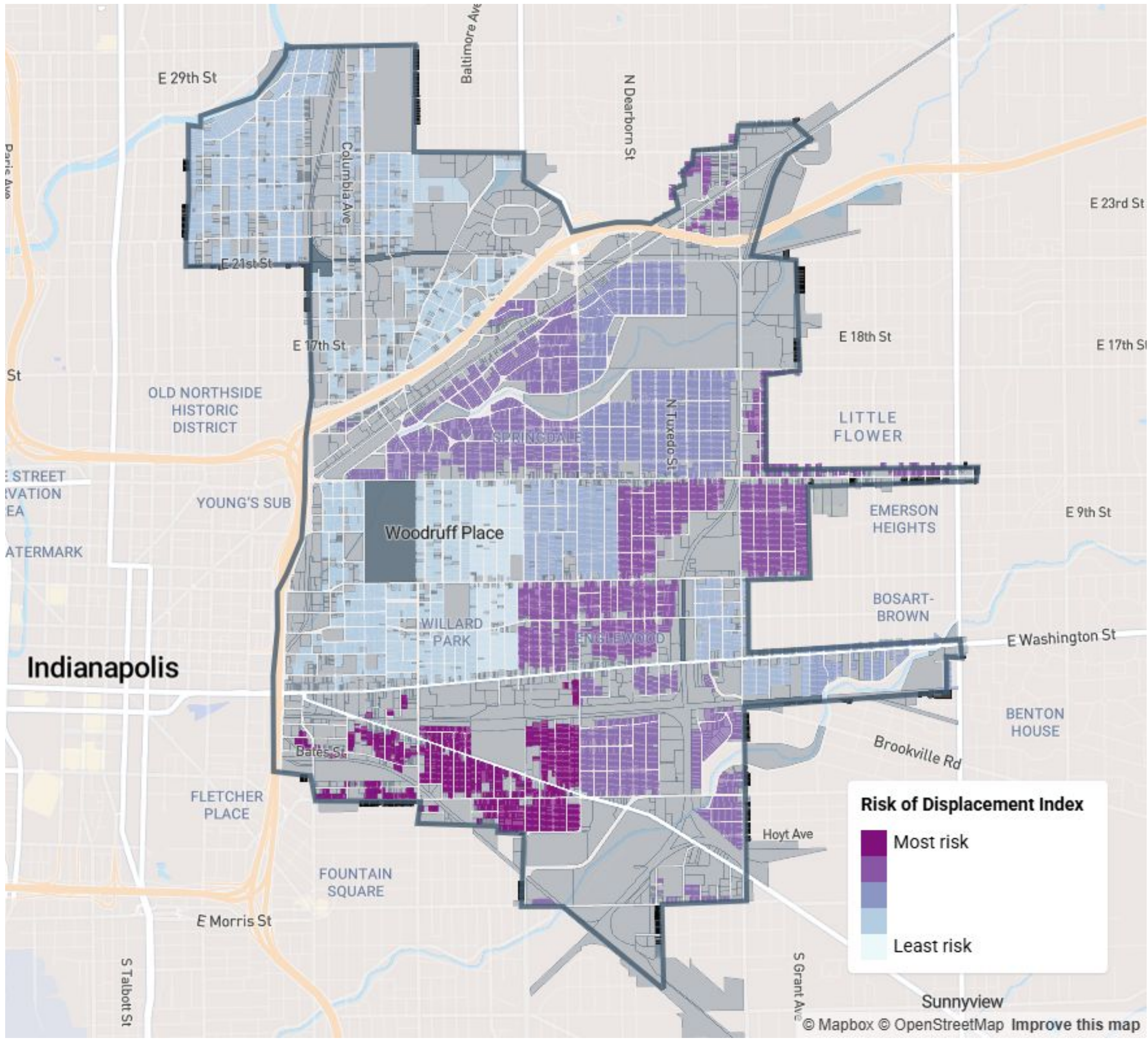
Parcel count	Year built	Average assessed value	Average percent land value	Average lot size (sq ft)
66	1900 or before	$124,106	22%	5,525
177	1900-1925	$106,966	11%	5,610
70	1925-1950	$100,359	11%	5,462
28	1950-1975	$77,136	11%	5,998
1	1975-2000	$87,700	8%	2,804
1	Since 2000	$173,500	20%	5,270

Displacement risk seniors

Sources: Census ACS 2023 5-Year; CommunityScale

The map at right indicates areas in the district where seniors face relatively high risk of displacement due to market forces such as gentrification. These areas contain relatively low property values and particularly high concentrations of low-income seniors, especially those who have lived in their current unit for extended periods of time.

This data can be explored on [this map](), choose the “Risk of Displacement - Age” layer in the upper left and select the “Over 65 Deduction” in the upper right.



Household structure shifts

Sources: Census ACS 2023 5-Year; CommunityScale

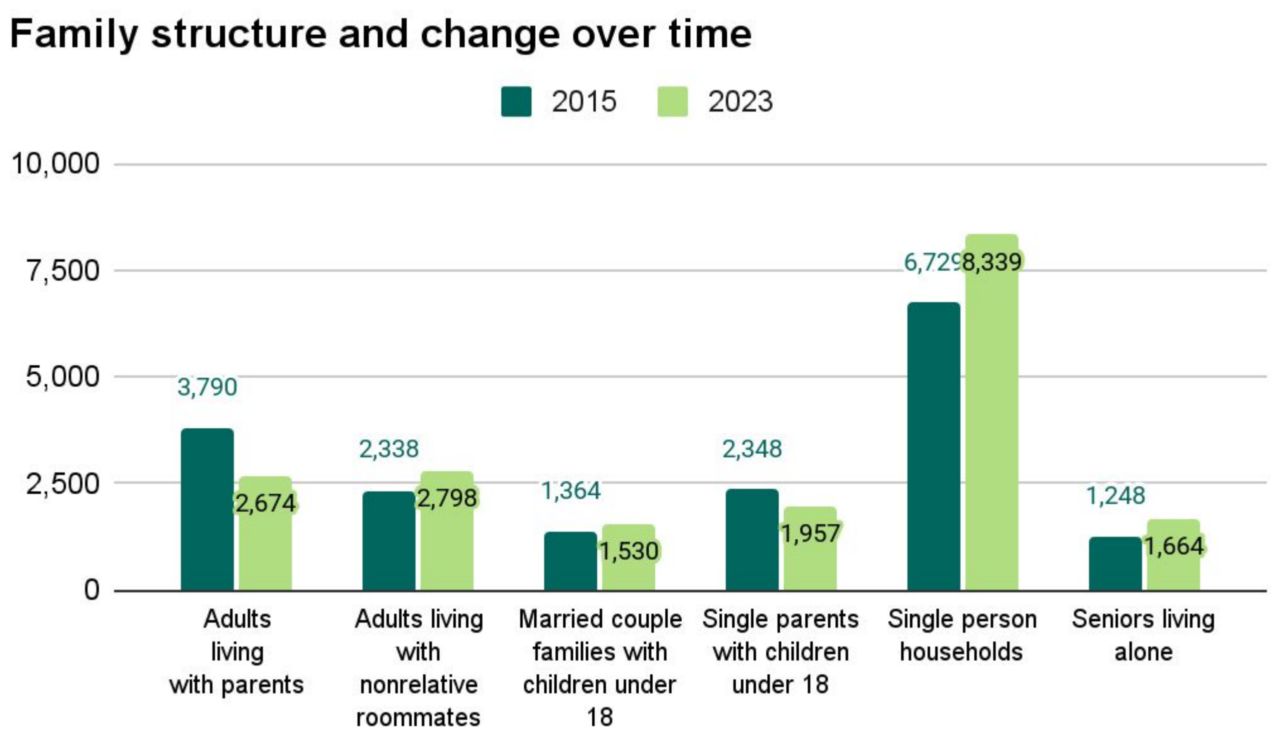
Household structures have been changing over recent years.

More:

- Adults living with roommates
- Married couples with kids
- **Single person households** *(the group growing the most)*
- Seniors living alone

Fewer:

- Adults living with their parents
- Single parents (though still outnumber married parents)

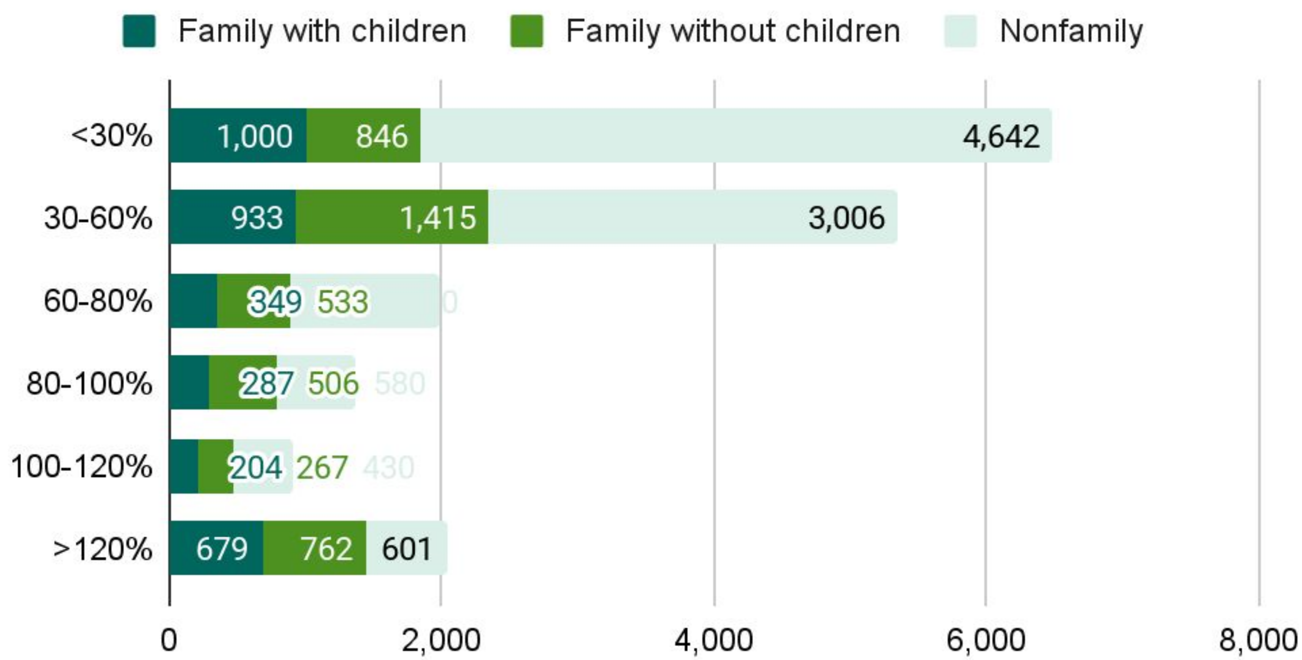


Nonfamily households lower-income than family households

Sources: Census ACS 2023 5-Year; CommunityScale

The majority of “nonfamily” households in the chart at right, single-person households are more likely to be lower-income than families with or without kids.

Number of households in each AMI group, by household type

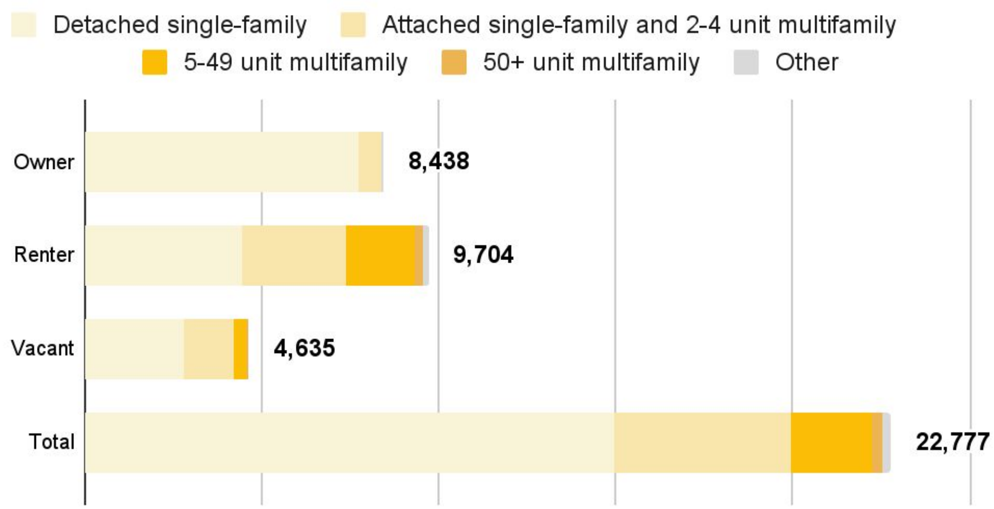


Mostly modest homes and small rentals

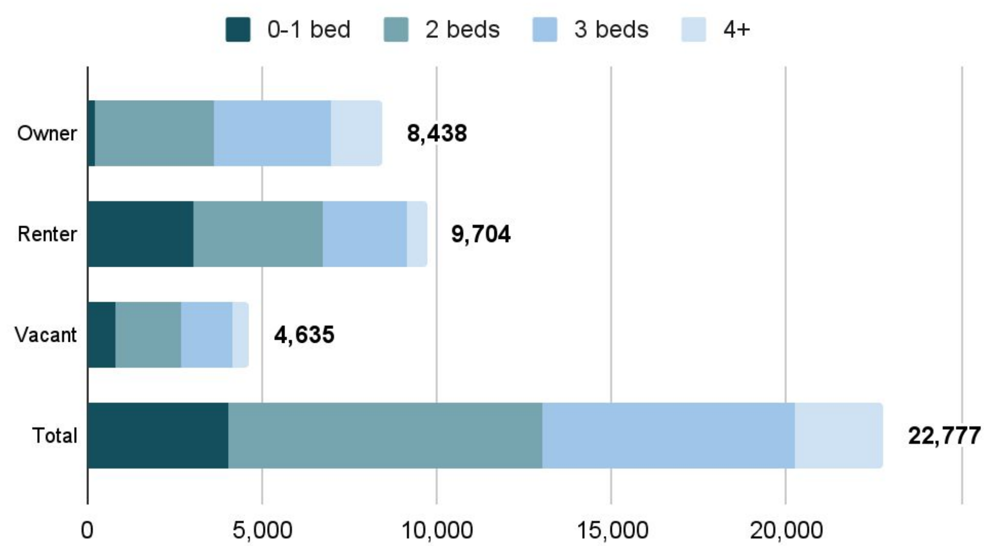
Sources: Census ACS 2023 5-Year; CommunityScale

There are not many small ownership units (0-1 bed) in the district. These could represent a stabile housing solution for homeowner seniors interested in downsizing and/or vulnerable to displacement if more could be created.

Existing units by structure type



Existing units by number of bedrooms

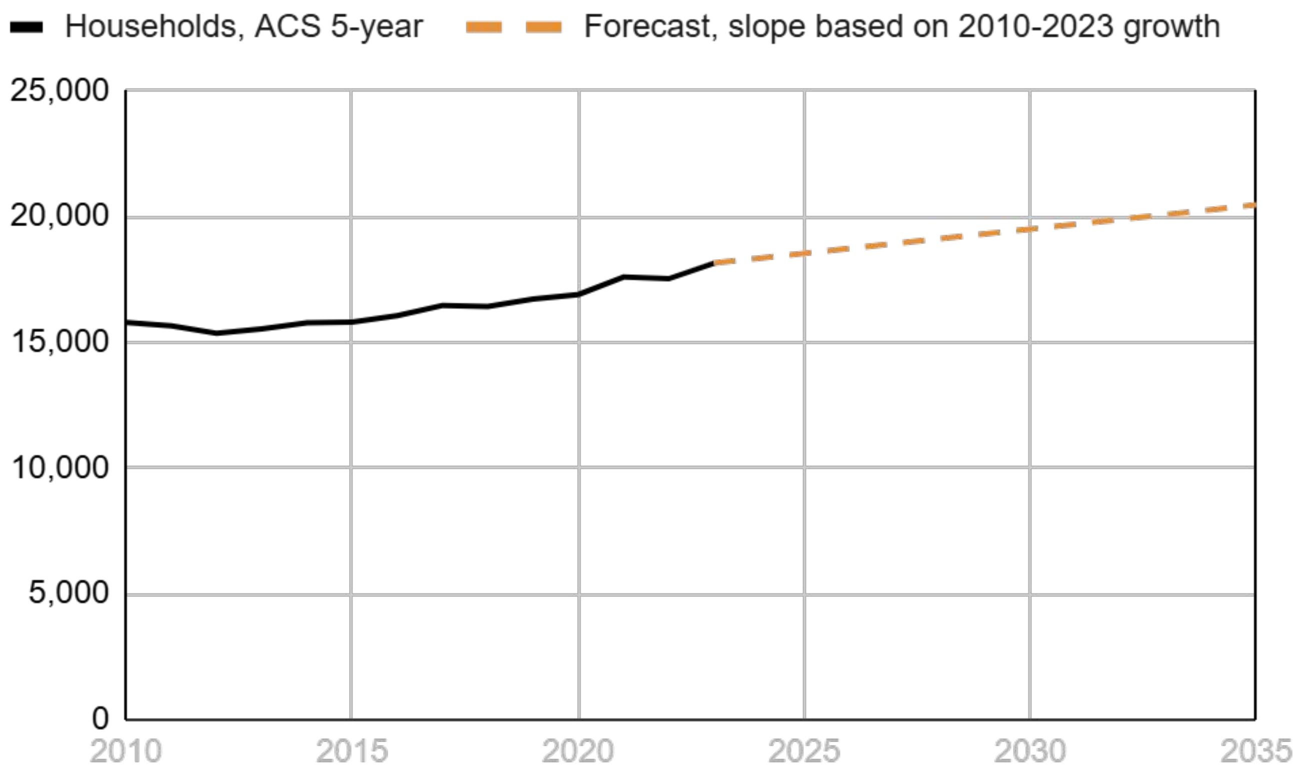


Growing gradually

Sources: Census ACS 2023 5-Year; CommunityScale

Recent trends extended, growth is projected to continue at a moderate pace with the district adding about 10% more households over the next decade. Given the range of market and affordability conditions in the district, it is possible this growth may be concentrated in certain areas of the district, leading to faster rates of change in some neighborhoods and less change elsewhere.

Projected change in household population



Year	Households	Net change since 2025
2010	15,783	-
2015	15,793	-
2020	16,893	-
2025	18,528	-
2030	19,493	965
2035	20,458	1,930

Housing construction

Sources: Census ACS 2023 5-Year; CoStar; CommunityScale

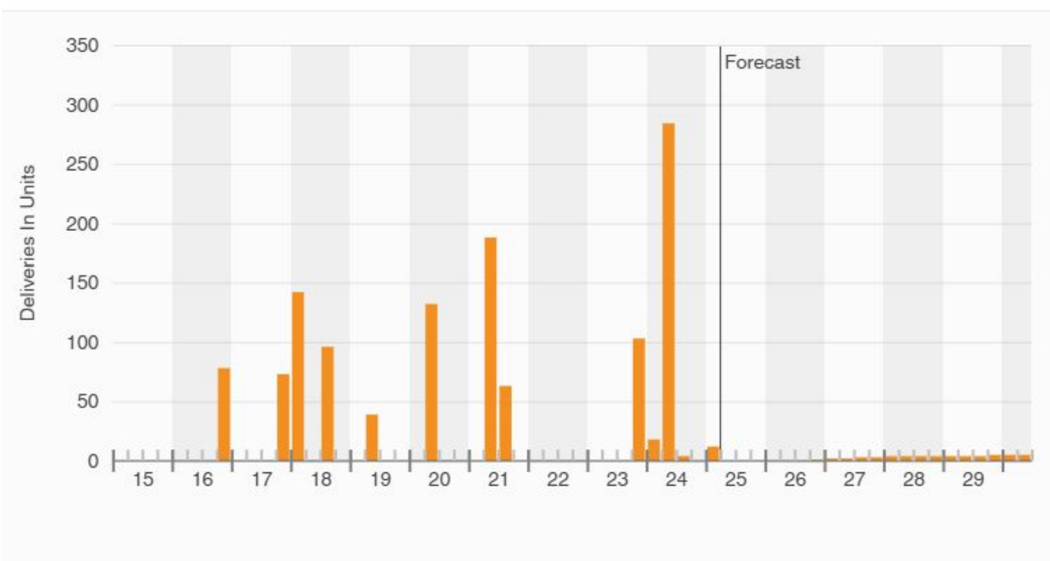
More than half of the current housing stock was built before 1940. Deferred maintenance may add cost pressure over time for these older units' residents and property owners.

However, over 1,200 multifamily units have been built in the district over the past 10 years, presumably to standard levels of quality and accessibility. About ⅔ of these units are within fully or partially income-restricted developments.

Existing housing stock by year built over previous decades

Year built	Units	Share
Built 2010 to 2019	1,107	5%
Built 2000 to 2009	563	2%
Built 1990 to 1999	553	2%
Built 1980 to 1989	439	2%
Built 1970 to 1979	1,443	6%
Built 1960 to 1969	1,400	6%
Built 1950 to 1959	2,208	10%
Built 1940 to 1949	2,933	13%
Built 1939 or earlier	12,036	53%

New multifamily units delivered by year in the district since 2015



Additional housing supply needed 2025-2035

Sources: Census ACS 2023 5-Year; CommunityScale, Harvard University Joint Center for Housing Studies

The following calculation translates household growth to a target for housing supply and related housing production. This calculation takes into account several adjustments intended to relieve underlying market pressures such as pent up demand.

1,930 Net growth in households

Housing supply needed to keep up with projected household growth over the next 10 years (MTP forecast)

ADJUSTMENTS

228 Replacement

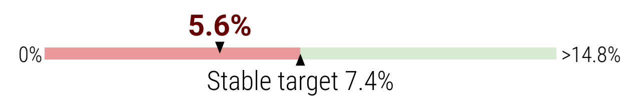
Housing production for 0.1% annual replacement of overall stock throughout the planning period.

0 Ownership vacancy

There are enough vacant ownership units to meet pent-up demand.

334 Rental vacancy

There aren't enough rental units available to meet pent-up demand, creating unsustainably low vacancy that can drive up prices.



0 Overcrowding

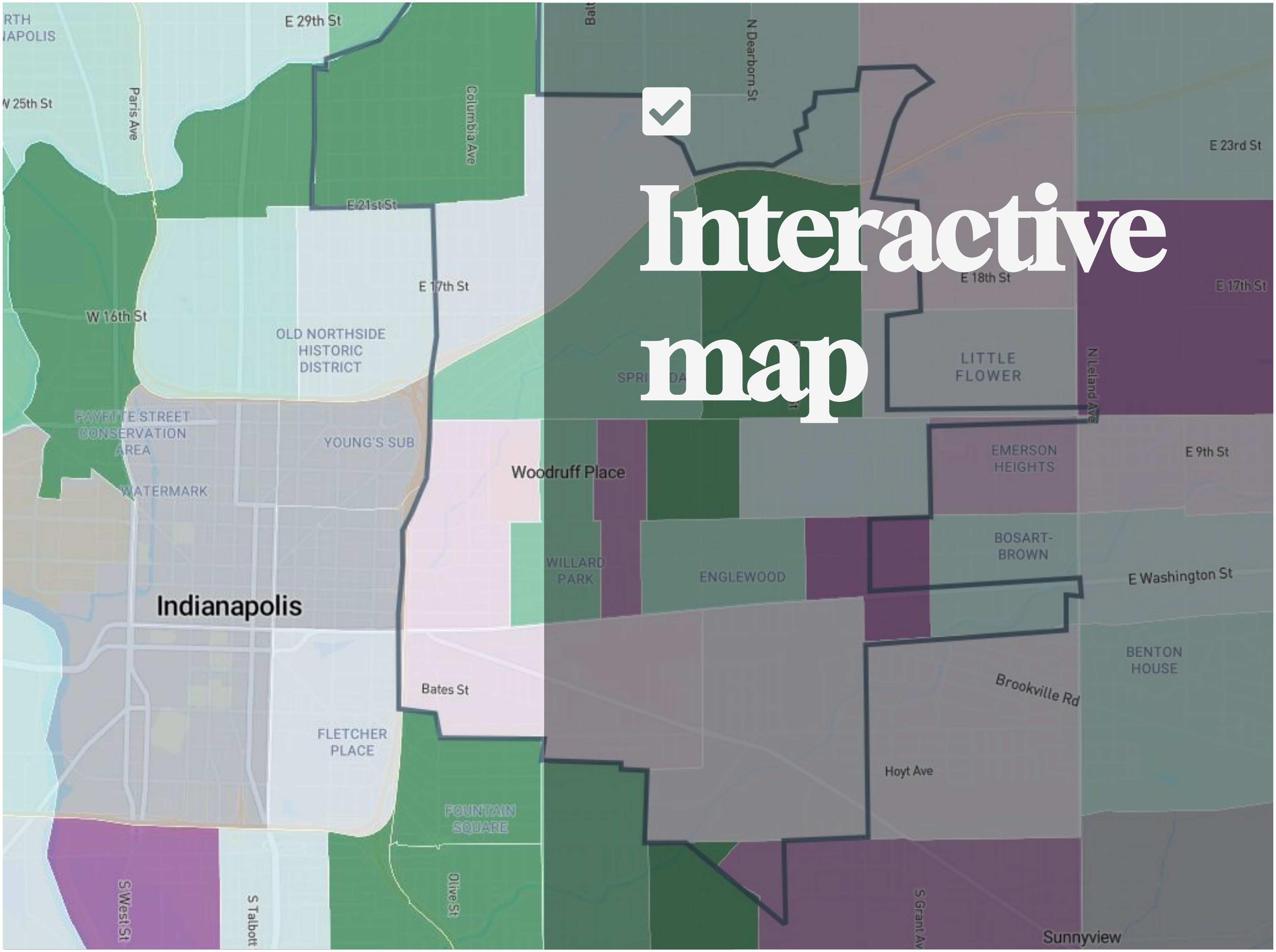
There aren't more overcrowded units than the national average, so no adjustment is needed.

89 Substandard housing

There are more substandard units than the national average, so an adjustment is needed.

2,581 Total 10-year additional housing production (13.2% total growth)

258 Annual housing production (1.3% annual growth)

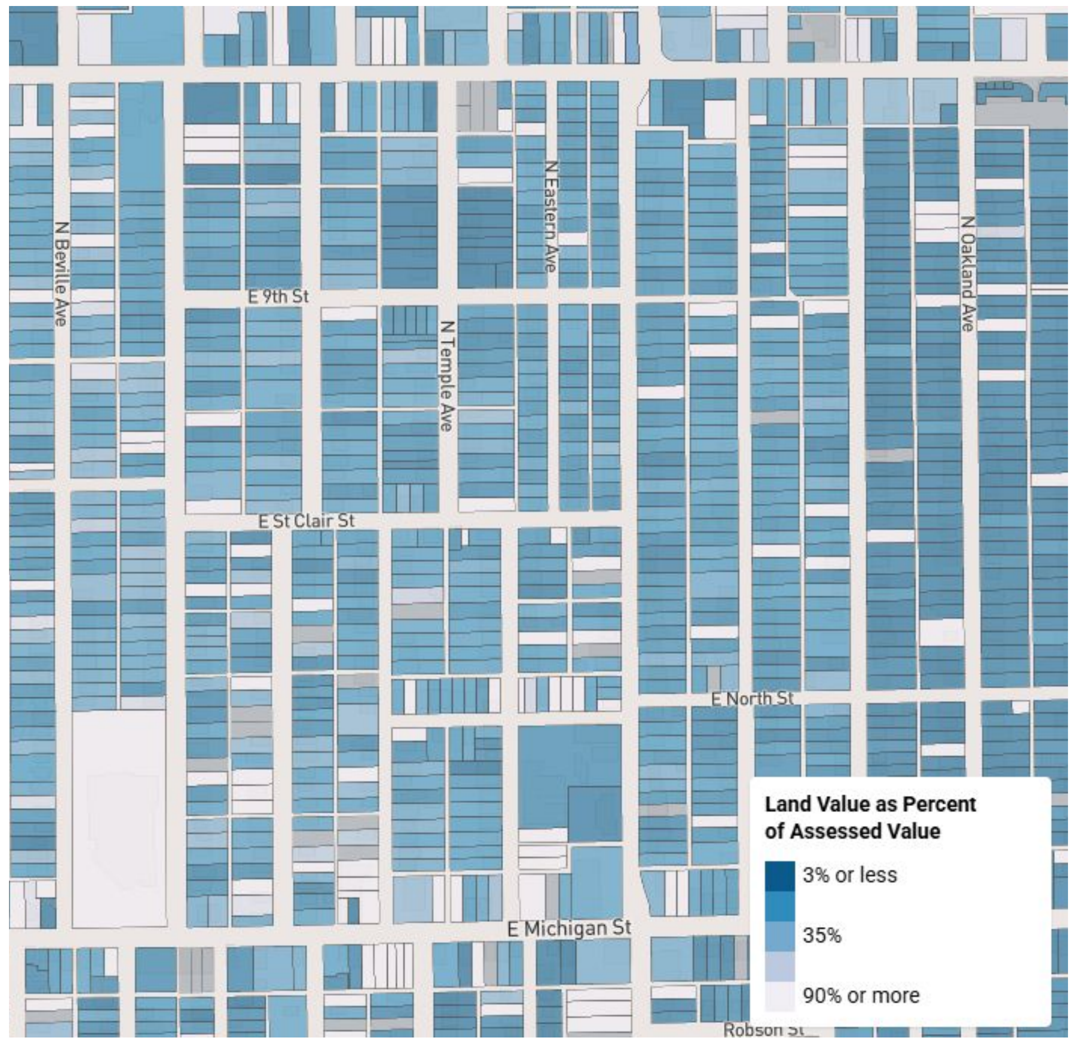

Interactive map
E 29th St
W 25th St
Paris Ave
Columbia Ave
N Dearborn St
E 23rd St
E 21st St
E 17th St
E 18th St
E 17th St
W 16th St
OLD NORTHSIDE HISTORIC DISTRICT
LITTLE FLOWER
N Leland Ave
FAYETTE STREET CONSERVATION AREA
YOUNG'S SUB
WATERMARK
Woodruff Place
EMERSON HEIGHTS
E 9th St
BOSART-BROWN
WILLARD PARK
ENGLEWOOD
E Washington St
Indianapolis
BENTON HOUSE
Brookville Rd
Bates St
FLETCHER PLACE
Hoyt Ave
FOUNTAIN SQUARE
S West St
S Talbott
Olive St
Sunnyview

Eastside Economic Mobility District interactive map

Sources: Census ACS 2023 5-Year, City of Indianapolis, CommunityScale

All maps supporting this analysis are available as interactive layers within this online map, including the following spatial data:

- Median household income
- Percent change in median income over the past 10 years
- Cost burden renters
- Cost burden homeowners
- Household population growth over the past 10 years
- Land use by parcel
- Land value as share of total value by parcel
- Displacement risk among seniors
- Displacement risk among ethnic minorities
- Over 65, homestead, and other property tax exemptions by parcel



Click here to access the interactive online version of this map.

Housing Study
Eastside Economic Mobility District

Revolving Loan Fund Guidelines

Program Description: The IndyEast Economic Mobility District (IEMD) Revolving Loan Fund for contractors is designed to strengthen the connection between housing, workforce, and economic development in the district. By providing accessible, affordable capital to general contractors and subcontractors working with Community Development Corporations (CDCs), the program addresses a critical financing gap that often limits small and mid-sized firms from fully participating in affordable housing construction.

Contractors in the district frequently face high-cost credit card debt, hard money loans, or other financing barriers when bridging the gap between project expenses and reimbursement schedules tied to HOME, CDBG, and other public funding sources. This program provides an alternative: fair, mission-driven loans structured to match project timelines and cash flow realities.

The benefits of the program include:

- **Expanding Affordable Housing Production:** Contractors gain reliable access to capital to complete CDC-led for-sale and rental housing projects, ensuring more units are delivered on time, with more consistent partnerships, and at lower cost.
- **Strengthening Local Businesses:** District-based and XBE-certified contractors are prioritized, helping grow local firms and build long-term capacity within the community.
- **Creating Jobs and Workforce Pathways:** By reducing financing barriers and opening a stronger pipeline of local work, contractors can retain and expand their crews, provide steadier employment, and open opportunities for hiring residents from the district.
- **Promoting Equity and Economic Mobility:** Interest rate incentives and eligibility criteria reward local hiring, supplier utilization, and participation in preferred contractor pools, aligning financial benefits with broader community outcomes.
- **Recycling Resources for Lasting Impact:** As loans are repaid, dollars remain dedicated to the district, supporting future projects and sustaining a cycle of reinvestment.

Together, these benefits ensure that the Revolving Loan Fund is more than a financing tool, but can also serve as a flexible catalyst for affordable housing delivery, small business growth, and economic mobility for residents of the IEMD.

Program Guidelines

Eligible Businesses	General Contractors and Subcontractors referred from Community Development Corporations in the district.
Eligible Projects	CDC for sale/rent, multi-family
Term	The loan term is based on the completion of the home or up to 12 months whichever one is sooner.
Interest Rates	5 – 10% (Range) 5 % - Floor 10 % - Ceiling
Amortization	The amortization schedule is based on the completion of the home or up to 12 months whichever one is sooner.
Eligible Uses	Any eligible construction, labor costs, soft costs, related to home construction. Limit soft costs.
Minimum Debt Coverage Service	1.10
Loan Amount	Up to 50% of construction costs
Eligible Borrowers	Registered Business in the State of Indiana
Origination Fees	1.5% Origination Fee
Payments	50% of submitted Invoices will be used to repay the disbursed amount
Allowable Collateral Types	• Personal Guarantees • Business Assets • 401k • Investments
Lien Position	1st Position
Documents Required for Application & Underwriting	• Completed Application • List of Subcontractors (if known for project) • Portfolio • Business Insurance • Personal Financial Statement (Investments, IRA) (3 Years) • Personal Tax Returns (3 Years) • Profit & Loss Statement (3 Years) • Balance Sheet (2-3 Years) • Proforma (3 Years) • Business Bank Statement - (2-3 Years-Vary) • Business Tax Returns - (2-3 Years-Vary) • Operating Budget (1 Year) • Existing Debt

Technical Assistance	Technical assistance will be available to contractors and subcontractors who need support in preparing the financial documents required for underwriting.

Interest Rate Adjustments Considerations

Upward Adjustments Considerations

- Contractor Location not located in the EEMD.
- Subcontractors are sourced from outside the district.
- Business is less than 3 years old.
- Loan is in second lien position.
- New Contractor who has not previously worked with a CDC in the district.
- Loan request with a term exceeding 12 months.

Downward Adjustments

- Business Location located in the EEMD.
- XBE Business (MBE, WBE, VBE).
- Existing positive relationship with CDC.
- Debt Coverage Ratio > 2.00 (based on actual and historical).
- Located in a historically vacant/contaminated site.
- Subcontractors sourced from the district.

Accountability + Adaptive Management Framework

This section recommends the standards for how the Revolving Loan Fund remains accountable to the Eastside Economic Mobility District and how the program should approach any program pivots post rollout. The goals are to: (1) demonstrate measurable benefit to district residents and businesses, (2) keep the product accessible and easy to use, and (3) ensure that all recycled dollars remain working inside the district.

Core Accountability Outcomes

The RLF will track and publicly report the following as its primary outcomes:

- Local jobs created or sustained on funded projects and with participating businesses.
- Local hiring (number of district residents hired by participating businesses).
- Minority-/Women-/Veteran-/Disabled-owned (XBE) participation (prime and subs).
- Housing units advanced (for-sale or affordable rental tied to district projects).

Secondary outcomes:

- Repeat borrowers and contractor business growth (e.g., revenue trend, employees, credit score increases).

- Contractor readiness improvements (via TA).
- Project delivery timeliness and cost variance vs. bid.
- Geographic distribution of projects within the district.

Data Collection & Reporting

- **Cadence:** Semi-annual reporting to the subcommittee; a brief annual roll-up for public sharing.
- **Data sources:** Borrower certifications, CDC confirmations, payroll or certified payroll summaries when applicable, closeout packages, and brief borrower surveys. Use existing documentation wherever possible to avoid admin burden on borrower.
- **Quality checks:** Spot audits on a small sample of projects each period
- **Privacy:** Publish aggregate results; redact personally identifying information.

Oversight & Roles

- **Program Administrator:** Intake, underwriting, compliance checks, semi-annual performance report.
- **IEMD Subcommittee:** Reviews semi-annual results, approves pivots within these guidelines, recommends policy changes.
- **CDCs/Project Sponsors:** Verify project milestones, confirm unit counts and contractor participation.
- **TA and Pipeline Partners:** Provide loan readiness support and pipeline building.

Accessibility & Ease-of-Use Principles

- Keep documentation aligned with what borrowers already produce for CDC/home/CDBG processes; no redundant forms.
- Maintain a clear pre-approval pathway so contractors know eligibility before bidding.
- Avoid excessive draw fees and retain below market interest rates

Reinvestment & Use of Recycled Funds

- All principal and interest repayments remain earmarked for the IEMD.
- Recycled dollars must be redeployed to eligible projects within the district; significant uncommitted balances should trigger a pivot discussion (see below).

Semi-Annual Review Agenda

Each review will include:

1. **Utilization:** dollars deployed vs. target; average time from application to closing; average time from draw request to disbursement.
2. **Portfolio Mix:** distribution by ownership type (for-sale/rental), product type (multifamily vs single family), XBE participation, local firm participation, GC/employer size, units per borrower, projects per neighborhood
3. **Outcomes:** units advanced, jobs and local hires, XBE and local firm participation, funds leveraged, other local partnerships (such as workforce training/pipeline development).
4. **Access & Equity:** approvals by firm size and readiness level; reasons for declinations.
5. **Cost & Operations:** delinquency/defaults, administrative costs vs. plan, borrower rate distribution.
6. **Marketing & TA Pipeline:** number of firms contacted, number of firms engaged with TA, number of firms converted to borrowers
7. **Recommendations:** any pivots proposed under the rules below.

Pivot Triggers & Options

To stay responsive without frequent rule rewrites, the program may pivot along predefined levers when data cross the thresholds below. All pivots should preserve accountability and accessibility.

A. Low Utilization

- Options (any combination):
- Reduce contractor equity requirement (e.g., from 50% toward 25–35%) or accept staged equity.
- Include subcontractors as eligible borrowers when tied to CDC/nonprofit projects.
- Broaden eligible project types within charitable constraints (see E for full list of options)
- Expand pre-approval outreach; add rolling intakes and office hours.
- Increase TA slots targeted to the underwriting gaps observed.

B. Excess Demand/Concentration

- Options:
- Lower per-loan caps to spread access.
- Prioritize first-time, XBE, or local borrowers for the next cycle.

C. Outcome Shortfalls

- Options:
- Strengthen rate incentives for local hiring or local firm participation.
- Make at least one workforce or local-subcontractor commitment an eligibility requirement on new approvals.
- Increase TA specifically for compliance with outcomes documentation.

D. Administrative Burden Rising

- Options:
- Simplify documentation (accept alternative proofs; consolidate forms).
- Add pre-approval validity windows (e.g., 120 days) aligned with CDC bid cycles.
- Fund administrative/TA costs with philanthropic dollars to keep rates competitive.

E. Idle Recycled Funds

- Options:
- Time-limited expansion to additional uses aligned with district mobility goals. Specific examples that were discussed previously include:
- Tenant Improvement loans for CDC-owned properties
- Contractor loans for vacant and abandoned property development (CDC-owned or city-owned)
- Contractor loans for CDC-owned commercial projects (non-housing)
- Local or XBE subcontractor loans for projects with a City contract. Would be modeled similar to Indy Chamber GAAP program.
- Note: All pivots should maintain local benefit requirement.

Technical Assistance Integration

- Create a standing referral loop with Jumpstart, ULI READI, LISC EDGI and similar contractor/developer training programs
- Use semi-annual data to target TA where deals most often stall (e.g., financial statements, insurance, bid estimating).
- Offer "TA-to-Preapproval" sprints before CDC bid rounds to expand the qualified pool
- Partner with LISC loan readiness workshops

Transparency & Communication

- Publish a semi-annual one-page dashboard (utilization, outcomes, access/equity metrics, pivots taken).
- Notify CDCs and contractors of any pivots at least 30 days before they take effect; provide updated checklists and rate matrices.

Incentives for Jobs Program Guidelines

Incentives for Jobs Program

Purpose: Provide direct, job-tied incentives for employers in the *Employer Champions Program*.

Eligibility:

- New or Expanding business located in the IEMD
- Engaged in Employer Champions Program, or has demonstrated capacity to partner with a CWF
- Be in good standing (no wage theft claims, compliance with labor law, not on debarment lists, etc.)
- **Priority Industries:** Preference is given to companies operating within an Opportunity or Target Industry, where upward mobility and middle-wage jobs are most prominent such as Manufacturing, Health Care, Construction, Real Estate, Wholesale, Professional Services
- **Ineligible Businesses:** Private or commercial golf courses, country clubs, hot tub or suntan facilities, racetracks or other gambling facilities, liquor stores, and direct or indirect marijuana businesses.

Incentive:

- Wage reimbursement for new hires sourced from a CWF training program: up to 6 months of subsidized wages, capped at $24/hr.
- 25-75% of the wage is subsidized. Exact subsidy is determined by application: amount of additional training committed by the employer, profile of employee hired, commitment to wage increase after training or retention, etc.
- $500 sign-on bonus to support employee transition needs (transportation, childcare, etc).

Administration and Reporting:

- Employer must submit a complete application to participate in the program
- When a CWF candidate is hired, the Employer must notify the CWF.
- **Reimbursement:** Funds flow directly from the CWF to the businesses on a monthly basis after submitting 1) payroll reports for the payroll period(s) and 2) reimbursement request outlining the eligible employee and associated wages for the reporting period.
    - If donor restrictions prevent reimbursement to businesses, CWFs may be able to serve as the fiscal agent and make payments direct to the employees.
- To reduce reporting requirements, payroll reports should be accepted in a variety of formats depending on the employer's payroll system. The reimbursement request should be a simple document requesting key information about each eligible employee such as:
    - Employee Name
    - Employee Hire Date
    - Employee ID
    - Current Title

- Payroll Period (Date Range)
- Hours Worked
- Current Hourly Rate
- Overtime Hours Worked
- Overtime Hourly Rate
- Total Reimbursement Request Value

2. Leveraging the Inclusivity Plan

Purpose: Create a structured pathway for employers receiving City incentives (Tax Abatements and TIF Training Grants) to support workforce development in partnership with Centers for Working Families (CWFs).

Mechanism: Expand the *Training* category of existing Inclusivity Plans (currently a requirement of Tax Abatements and TIF Training Grants to contribute 5% of tax savings to transit, training, or childcare programs). Formalized through an MOU with Indy Economic Development, who would negotiate the Inclusivity Plan with the Company.

Employer Options:

- **Option A: Direct Fund Contribution**
  - Contribute 5% to the CWF Workforce Development Fund as flexible implementation or capacity funding.
  - Best for small employers or those without strong alignment to CWF clients.
    - Existing Precedent: Donation to Employ Indy via Indy Achieves, Talent Bound, etc.
- **Option B: Employer Champions Participation**
  - Commit to local hiring, guaranteed interviews, structured mentorship, hosting paid training, or other programmatic components of the Employer Champions Program.
    - Existing Precedent: Participation in Talent Bound (Employ Indy) as an Inclusivity Plan option
  - Local Hiring: Wages for employees hired through a CWF (retained 6+ months) count toward the 5% requirement (wage caps consistent with Incentives for Jobs program)
    - If Company hires beyond their 5% requirement and would like to continue participation, they may be eligible for direct funding via Incentives for Jobs.
  - Local Training: Training investments for district residents also count toward requirement.
    - Best suited for companies that are hiring 5+ new jobs and are aligned with priority industries or CWF-supported careers.

Compliance:

- Managed by the City of Indianapolis (existing reporting infrastructure in place).
- Companies report annually on activity within Inclusivity Plan; documentation aligned with City incentive compliance.
- Company contributions (payroll or donation) are considered leveraged.

Ideal Outcomes:

- Raises employer awareness and participation with CWFs.
- Pilots best practices using existing countywide mechanisms.

MEMORANDUM OF UNDERSTANDING ("MOU") BETWEEN INDY ECONOMIC DEVELOPMENT, INC. ("IEDI") AND JOHN H. BONER COMMUNITY CENTER, INC. ("BONER CENTER") FOR THE IMPLEMENTATION OF THE INDYEAST ECONOMIC MOBILITY DISTRICT ("IEMD")

This Memorandum of Understanding ("MOU" or "Agreement") is entered into by and between Indy Economic Development, Inc., a nonprofit entity organized and existing under the laws of the State of Indiana ("IEDI"), and the John H. Boner Community Center, Inc., doing business as John Boner Neighborhood Centers, an Indiana nonprofit corporation ("Boner Center"), collectively referred to as the "Parties," for the purpose of outlining the terms and responsibilities related to the implementation of the IndyEast Economic Mobility District ("IEMD").

RECITALS

WHEREAS, the federal government made a ten-year designation of the IndyEast Promise Zone, which is designed to improve education, increase the availability of affordable housing, create jobs, promote economic development and improve public safety;

WHEREAS, the State of Indiana and the U.S. Department of Treasury have made a designation of certain tracts as Opportunity Zones, which are designed to offer federal tax breaks to those who invest in projects located in the designated tracts;

WHEREAS, the State of Indiana has made a designation of the IndyEast Promise Zone as a 21st Century Talent Region, which is designed to attract, develop and connect talent by implementing a plan to increase educational attainment and raise household income;

WHEREAS, the named implementation partners of the IEMD have studied and determined that innovative systemic and structural changes are necessary to address the economic stability , recovery, and mobility of residents within the combined IndyEast Promise Zone and Opportunity Zone geographies;

WHEREAS, decreased unemployment and increased household income for unemployed or underemployed neighborhood residents is one of the main goals of the IndyEast Promise Zone designation;

WHEREAS, there are currently and anticipated to be future funding applications that will provide resources to support the IEMD; and,

NOW, THEREFORE, in consideration of the mutual promises and covenants set forth herein, the Parties agree as follows:

Section 1: Vision of the IndyEast Economic Mobility District

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.

Section 2: Theory of Change

The IEMD was created to ensure every Eastside neighbor has the opportunity to build wealth that stays local and lasts for generations. Our work aims to stabilize and strengthen neighborhoods, and to bring investment and employment back to long-neglected corridors. Together, we're aligning resources, reimagining vacant properties, and advancing strategies that remove barriers and expand opportunities. Our place-based approach is grounded in decades of collaboration and guided by the voices of our neighbors, reflecting a proven track record of success in making our District a great place to live, work, and learn. The IEMD is creating a foundation for lasting, shared prosperity – built by and for the people who live here.

Section 3: Theory of Action

The IEMD theory of action is a shift in thinking, planning and implementation of economic, housing, and
social supports to improve opportunities for individuals and families residing in the IEMD. Based upon the results of consistent, data-driven evaluation and assessments and community engagement, strategies in the IEMD will guide residents along a pathway of economic mobility. Results-driven, evidence-based strategies will center on seven core components:

1. Asset Building;
2. Entrepreneurship and Business Enterprises;
3. Workforce Development;
4. Social Enterprise;
5. Housing Innovations;
6. Resident Engagement, and;
7. Lifelong Education.

Through engagement in IEMD strategies, residents of the IEMD will work together to promote changes in systems and neighborhood dynamics to support these pathways out of poverty.

In respect to Economic Development, the IEMD shall advance a coordinated approach to business attraction and retention, workforce development, real estate investment, and small business support. Strategies shall be informed by data and resident engagement.

Section 4: Definition of the Target Area

The footprint of the IEMD target area resides within the Eastside and Southeast side communities of Indianapolis and includes the areas commonly known as Martindale-Brightwood, the Near Eastside, Fountain Square, Twin Aire, and parts of the Near Southeast side. This ~15.8 square mile area is the home of approximately 60,327 residents (as of the 2023 U.S. Census Bureau ACS 5-Year Estimates) and follows the following boundaries: I-65/70 and the Monon Trail to the west, Raymond Street to the south, Emerson Avenue to the east, and 30th Street to the north – inclusive of parcels along both sides of each boundary street and avenue. The target area encompasses the total area of the IndyEast Promise Zone, superimposed Opportunity Zones, and surrounding neighborhoods.

Section 5: Partners

A broad Consortium of partners has been selected to ensure that strategies may be successfully implemented across a broad geography:

a. *Neighborhood Center Partners*: John Boner Neighborhood Centers, Edna Martin Christian Center, Southeast Community Services

b. *Community Development Partners*: Edna Martin Christian Center – Community-Based Development Organization Subsidiary, Englewood Community Development Corporation, Near East Area Renewal, Southeast Neighborhood Development, Martindale Brightwood Community Development Corporation, Shepherd Community Center, Habitat for Humanity of Greater Indianapolis, Home Repairs for Good

c. *Data and Evaluation Partners*: CityStrategies, LLC; United Way of Central Indiana

d. *Systems Partners*: Intend Indiana, EmployIndy, Indianapolis Neighborhood Housing Partnership, Indy Economic Development, Local Initiatives Support Corporation Indianapolis, Prosperity Indiana, United Way of Central Indiana

e. *Local Government Partners*: The City of Indianapolis

Section 6: Governance

a. **Partner Consortium:** The Partner Consortium shall be composed of representatives of each of the IEMD partners. The Consortium shall hold meetings at least semiannually in which members provide guidance, support, and strategic direction pertaining to programs and initiatives, their implementation, and other matters necessary and proper for the functioning of the IEMD. In addition, the Partner Consortium shall ensure that relevant data is collected and that systems are being built and utilized.

b. **Neighborhood Center Alliance:** Whereas the IEMD is an initiative arising from the planning grant application submitted by the John Boner Neighborhood Centers, Edna Martin Christian Center, and Southeast Community Services, the IEMD shall maintain a Neighborhood Center Alliance composed of the directors of these three organizations and designated members of IEMD permanent staff. The purpose of this Alliance shall pertain to advancing the mission, vision, and goals of the District in accordance with agreed-upon shared values. The Alliance shall serve as a permanent standing Committee with an advisory role towards, but not authority over, the Partner Consortium. To foster increased collaboration, cross-membership on Alliance members' boards of directors shall be encouraged. The Alliance shall meet at a frequency of its choosing, and decisions of the Alliance shall be made by unanimous consent of its members.

c. **Committee Engagement:** The expanded work of the IEMD may occur within

Committees, each of which shall have discretion to create subgroups for specific initiatives, strategies, or activities as determined by the Committees. Committees and subcommittees shall meet at a frequency of their choosing. Members of the Partner Consortium may form and dissolve Committees on an ad hoc basis.

d. **Resident Engagement:** Core to the establishment of the IEMD are the principles of community organizing, resident engagement, and asset-based community development principles. The strategies comprising the IEMD were developed from a variety of community planning processes conducted throughout the District. The following are the key plans that form the basis of the District and the proposed strategies being employed:

i. East Washington Street Vision Plan;
ii. Sherman Park Redevelopment Plan;
iii. Twin Aire Comprehensive Redevelopment Plan;
iv. Eastside RDA Designation;
v. Greater Martindale-Brightwood RDA Designation;
vi. Norwood RDA Designation;
vii. IndyEast Promise Neighborhood Strategic Framework; and,
viii. Quality of Life Plans for Martindale-Brightwood, Southeast, and Near Eastside.

Section 7. Mutual Commitments

This Agreement shall become effective as of [Insert Date] and shall remain in effect for a period of five (5) years, or for the duration of relevant grant funding, whichever period is shorter, unless terminated earlier pursuant to the provisions of this Agreement.

Boner Center shall employ the Economic Development Manager ("Manager") and provide all necessary salary, benefits, equipment, and programmatic funding. s

The Manager shall collaborate with IEDI business development team members on projects and initiatives in the District. The team shall focus on business expansion; real estate development strategy; and coordination with city departments and community stakeholders. The Job Description (Attachment A) contains the full scope of the Manager's duties.

The Manager shall manage a shared project tracker and submit monthly reports to both Parties detailing key performance metrics, project updates, and qualitative success stories.

IEDI shall offer additional staff time to support the IEMD as appropriate, including but not limited to: Leadership, Business Retention and Expansion, Communications, and Ombudsman/Permitting Navigation Services.

IEDI and Boner Center shall jointly collaborate to integrate IEMD priorities into city-led economic development strategy, tools and processes as appropriate.

IEDI shall ensure that any outreach or engagement of companies within the IEMD will be communication to and coordinated with the Manager in advance.

IEDI shall ensure that Companies within the IEMD receiving city-led incentives are encouraged to adopt inclusivity plan components that reflect IEMD priorities, in lieu of a CBA. The full scope of this strategy is outlined in Attachment B.

IEDI shall help support and pilot new loan and incentive programs that would be coordinated by the Manager on behalf of the IEMD. Attachment C outlines such programs.

Section 8. Goals And Metrics
The Parties shall determine mutually agreed-upon performance metrics within ninety (90) days of the Manager's hire. The goals of the partnership shall include:

- Increasing capital investment within the district;
- Creating and retaining jobs that pay a living wage;
- Strengthening the ecosystem of small and locally owned businesses;
- Raising household income and building community wealth;
- Supporting new building construction and rehabilitation projects;
- Reducing the number of vacant industrial and commercial properties;
- Promoting the development of diverse, mixed-income housing;
- Ensuring equitable implementation of City tools and processes;
- Elevating the District in the context of regional economic development strategies.

Section 9. Communication
The Parties agree to maintain open and consistent communication throughout the duration of this Agreement. IEDI shall hold one (1) seat on the IEMD Steering Committee or it's related economic development committee [insert additional governance detail].

Designated contacts for the purposes of implementation, reporting, and communication shall be:
Boner Center/IEMD Leadership: Elizabeth Nash, IndyEast Economic Mobility District Director
IEDI Leadership: Turae Dabney, Vice President of Community Relations & Initiatives
The Parties shall convene monthly check-in meetings and collaborate on shared initiatives and reporting requirements.

Section 10. Reporting and Evaluation
The Manager shall provide written monthly updates to both Parties related to economic development activity. Reports shall include updates on key performance indicators,

qualitative success stories, and a summary of activities noted in the shared project tracker.

Section 11. Branding and Data Ownership
All public-facing deliverables of joint projects shall be co-branded with IEMD and IEDI logos.

All data, reports, and programmatic materials developed as a result of this partnership shall be considered jointly owned by Boner Center and IEDI, unless subject to confidentiality or non-disclosure agreements ("NDAs") required by external partners. NDAs shall take precedence only where terms are not in conflict with the stated values of this Agreement.

Section 12. Amendments and Termination
This Agreement may be amended only by mutual written consent of both Parties.
Either Party may terminate this Agreement upon thirty (30) days' written notice in the event of: (a) material failure to adhere to the goals outlined herein; (b) continued underperformance in relation to the agreed-upon metrics; (c) breakdown in communication or cooperation; or (d) inability to provide appropriate staff support or programmatic oversight.

Section 13. Execution
IN WITNESS WHEREOF, the Parties hereto have executed this Memorandum of Understanding as of the date set forth below.

Indy Economic Development, Inc.:
Name: ___________________________
Title: ___________________________
Date: ___________________________

Boner Center / IEMD:
Name:
____
Title:______________________
Date: _____________________

IEMD Economic Development Implementation Contract

Contractor: Valo Advisory (Susanna Taft Illig)
Client: IndyEast Economic Mobility District (through the John Boner Neighborhood Centers)
Term: 12 months (January–December 2026)
Total Not-to-Exceed: $100,000 at $160/hr

I. Purpose

To provide interim strategic and operational leadership for the implementation of the IndyEast Economic Mobility District's (IEMD) Economic Development efforts, with a focus on activating business, real estate, and investment initiatives identified through the 2025 planning process.

This contract bridges the gap between planning and long-term staffing by building systems, activating early projects, and preparing for a future, sustainable district-based economic development position.

II. Structure and Support

Valo Advisory will serve as **contracted economic development lead** for IEMD's Economic Development implementation, working closely with:

- **Boner Center designated staff member(s)**, who will provide day-to-day administrative, communications, and small business engagement support;
- **Indy Economic Development (IEDI)**, which will provide technical assistance, access to data systems, economic development leadership, and integration with citywide programs; and
- **The IEMD Leadership Team**, which will provide direction and oversight.

Together, this team will ensure that IEMD's business and investment initiatives are coordinated, measurable, and aligned with broader district and city strategies.

III. Scope of Work

A. Program Management and Coordination (25%)

- Support the coordination of IEMD's economic development initiatives.

- Develop a shared workplan and performance tracking dashboard.
- Manage partner alignment meetings and communications (with support from Boner Center).
- Coordinate with Workforce and Housing strategies to ensure alignment and integration with business community and economic development priorities.
- Prepare quarterly progress reports for the Leadership Team and funders (or as needed).

B. Business Retention, Expansion, Attraction, and Small Business Coordination (30%)

- Oversee district-level BRE outreach in collaboration with IEDI, conducting business visits, maintaining contact logs, and sharing useful insights/resources.
- Support Boner Center staff in identifying small business priorities, gaps, and technical assistance needs for coordination with CDCs and partner organizations.
- Build a district-level business contact sheet/database and define appropriate business communication systems.
- Build a BRE & Attraction playbook by EOY, capturing best practices and effective methods of supporting district-based businesses.

C. Real Estate and Investment Attraction (30%)

- Support IEDI in effectively attracting new business investment to the district.
- Identify and prioritize investment in catalytic redevelopment sites and vacant/abandoned properties.
- Coordinate with CDCs to support corridor redevelopment strategy.
- Coordinate with IEDI on site packaging, feasibility, and investment readiness.
- Connect developers (with special emphasis on district-based or MBE developers) with redevelopment opportunities and funding resources.
- Support applications for site readiness, infrastructure, or place-based funding opportunities.

D. Systems, Reporting, and Transition Planning (15%)

- Build and document repeatable processes, templates, and partner protocols.
- Establish internal data and reporting systems.
- Support the IEMD leadership team in designing a long-term staffing and funding model for a permanent Economic Development Manager.
- Provide onboarding materials and training to future staff.

IV. Integration with Boner Center Supporting Role

Boner Center Support Staff Focus Areas:

- Support business outreach coordination and follow-up.
- Assist with meeting logistics, partner scheduling, and communication materials.
- Maintain the business directory and small business resource listings.
- Provide light one-on-one support to small businesses (referrals, basic TA coordination).
- Collect stories, metrics, and testimonials to inform reports and communications.

Valo Advisory's Role with the Boner Center Staff:

- Provide strategic direction and guidance.
- Connect small business activities into broader economic development objectives.
- Serve as a mentor and technical resource for professional development.

This structure creates a paired leadership model with Valo Advisory as the strategic lead and the Boner Center Staff as on-the-ground support. This approach balances capacity, efficiency, and long-term knowledge transfer.

V. Partnership with Indy Economic Development (IEDI)

IEDI will provide limited technical support and implementation partnership during the first year to ensure district projects integrate seamlessly into citywide systems and data platforms. Support may include:

- Data sharing (BRE, sites, and incentives).
- Joint business visits and project coordination.
- Collaboration on potential incentive or investment opportunities.
- Marketing and communications alignment for district promotion.

VI. Time and Budget Summary

Category	Est. Hours	Rate	Budget
Valo Advisory	625 hrs	$160/hour (reflects a discount of ~10%)	$100,000
Total			**$100,000**

VII. Estimated Monthly / Quarterly Hours

Quarter	Focus	Est. Hours
Q1	Launch, partner alignment, data setup, workplan development, begin business visits	160
Q2	BRE strategy, real estate strategy, reporting dashboard, incentive implementation alignment	155
Q3	Active projects, small business coordination	155
Q4	Systems documentation, transition planning, project handoffs, final reporting	155
Total		**625 hrs**

Invoices submitted **monthly**, with a summary of activities and hours.

VIII. Deliverables

- Annual Economic Development Workplan & Dashboard
- Updated business and site inventory database
- Quarterly progress reports and partner updates

- Draft staffing and sustainability plan for permanent ED position
- Documentation of systems and templates (handoff guide)

IX. Relationship to IEDI and Boner Center

Valo Advisory will serve as an **independent contractor** under the Boner Center, reporting to IEMD leadership. The contractor will maintain close coordination with IEDI to ensure alignment, while the Boner Center’s designated staffer provides day-to-day administrative and small business engagement support within the district.

IndyEast Economic Development Manager

Location: Indianapolis, Indiana
Position Type: Full-time, grant-funded
Salary: $65,000-$80,000 annually, commensurate with experience
Employed By: John H. Boner Neighborhood Centers

Position Overview
The Economic Development Manager serves as the IEMD's key connector among businesses, developers, community development corporations (CDCs), Indy Economic Development Inc (IEDI), and neighborhood partners. The role supports business attraction and retention efforts, advances redevelopment of underutilized properties, coordinates incentive strategies and ensures that inclusive economic development supports the district's long-term economic mobility goals. This role is ideal for someone who thrives on building authentic relationships, understands both community and development dynamics, and can bridge the gap between neighborhood needs and economic opportunity.

Core Responsibilities
Strategy & Alignment (20%)
- Develop and implement an annual IEMD economic development workplan.
- Maintain alignment with key citywide economic development strategies and IEDI priorities as appropriate.
- Identify opportunities to integrate economic development strategy with workforce and housing initiatives.
- Produce quarterly progress reports and coordinate regular partner updates.

Relationship Management & Partner Coordination (15%)
- Build strong, trust-based relationships with community partners, neighborhood leaders, and anchor institutions.
- Develop relationships with businesses through direct outreach and retention visits across the district.
- Promote investment in the district through the creation of promotional materials and storytelling in partnership with IEDI and other community partners.
- Advocate for redevelopment efforts that are aligned with community goals.
- Act as a liaison between IEMD and economic development partners, maintaining consistent communication with city- and region-wide economic development entities.
- Represent IEMD Economic Development at community gatherings.
- Maintain business contact systems, logs, and district-level communication processes.

Real Estate Activation & Business Investment (50%)

- Identify small businesses gaps and growth opportunities and coordinate technical assistance with providers.
- Identify and promote catalytic redevelopment sites and real estate opportunities.
- Maintain updated site inventories and investment readiness materials.
- Assist in securing funding and assembling place-based investment applications.
- Help businesses and developers (especially MBEs) access real estate opportunities and resources.
- Collaborate with Indy Economic Development to support existing businesses and attract new investment with incentives and the creation of relevant MOUs.
- Contribute to the design and implementation of district-specific business tools such as the Economic Development Revolving Loan Fund and the Incentives for Jobs program.

Program Design & Analysis (15%):

- Help develop replicable systems, templates, and reporting processes.
- Build internal processes for data, coordination, and business engagement.
- Analyze, monitor, and report on program data, ensuring goals and objectives are met.
- Identify areas of improvement through program evaluation in collaboration with community and program partners.

Qualifications/Skills

- Bachelor's degree in public administration, community development, business administration, or a related field preferred. Three or more years of related work experience will also be considered.
- 3+ years of experience in program development and/or project management.
- 2+ years of experience in economic development, small business development, community development or real estate preferred.
- Strong relationship-building and facilitation skills; able to work across business, government, and community sectors.
- Demonstrated experience working with diverse populations.
- Requires strong written/verbal communication and critical thinking skills.
- Requires strong organizational skills and the ability to manage multiple tasks and projects.
- Requires comfortability working independently and in collaborative team environments.
- Requires access to reliable transportation.

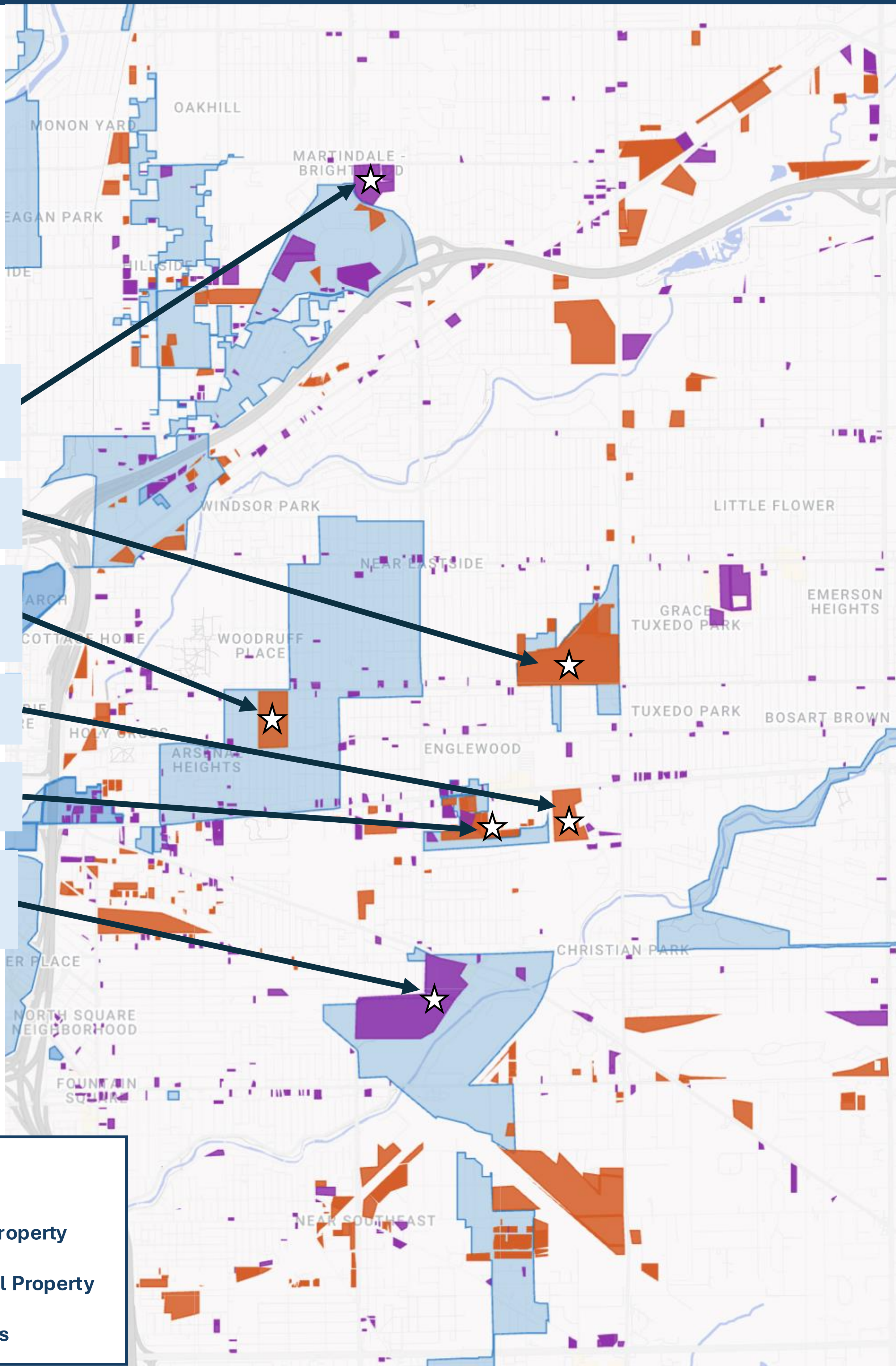
Work Environment

- Position will be based in-person at the John H Boner Neighborhood Center, with frequent meetings in the field and at partner locations.
- Occasional evening or weekend availability may be required.

About the IndyEast Economic Mobility District (IEMD)
The IndyEast Economic Mobility District (IEMD) is a bold initiative designed to strengthen communities and stabilize families. In partnership with the John H. Boner Neighborhood Center, Edna Martin Christian Center, Southeast Community Services, and residents from three neighborhoods (Near East, Martindale Brightwood, and Southeast Indy), the IEMD will foster a vibrant local economy where all residents have access to the tools they need to thrive. This place-based initiative focuses on increasing economic mobility through coordinated investments in business development, workforce, housing, and infrastructure. Rooted in values of equity, intra- and intergenerational wealth creation, and access to opportunity, the IEMD brings together residents, community organizations, and institutional partners to drive long-term, inclusive change.

IndyEast Economic Mobility District

Vacant Commercial & Industrial Properties



Key Sites for Future Development:

Marion County Juvenile Aid Center
2451 N Keystone Ave

Sherman Park
816 N. Sherman Dr.

Former Indiana Women's Prison
401 N. Randolph St.

Black Mountain
3500 E. Washington St

PR Mallory
3029 E. Washington St.

Twin Aire Drive-in / Shopping Plaza
2901 Southeastern Ave.

Map Key

- **Vacant Industrial Property**
- **Vacant Commercial Property**
- **Existing TIF Districts**

Economic Development IMPLEMENTATION TIMELINE

2026 to 2031

ALL 5 YEARS

- Real Estate Investment
- Corridor Redevelopment
- Strengthen access to regional opportunities
- Business Expansion
- Credit Score Increase

2026

LAUNCH
- Revolving Loan Fund

HIRE
- Economic Development Manger

PLAN
- IEDI Partnership

EXPLORE
- Key Site Developments
- Identify Employer Sites
- Inclusivity Plan integration

2027

PLAN
- Portal for IEMD real estate opportunities
- Business Development support

EXPLORE
- Key Site Developments

COMPLETE
- Initial contractors recieve RLF funds
- Initial Job Placements

2028

PLAN
- Facilitate Capital Access

EXPLORE
- Investment attraction
- Corridor redevelop-ment

COMPLETE
- Administer RLF Funds
- Incentives for Jobs placements
- Leverage Inclusivity Plan

2029

EXPLORE
- Key Site Development

COMPLETE
- Administer RLF Funds
- Incentives for Jobs Placements
- Leverage Inclusivity Plan
- Business Development Supports

2030

EXPLORE
- Key Site Development

COMPLETE
- Administer RLF Funds
- Incentives for Jobs Placements
- Leverage Inclusivity Plan
- Business Development Supports

2031

COMPLETE
- 35 loans administered to support developers
- 90 job placements
- Key Site Advancement
- Connect businesses with larger Economic Development Initatives

Economic Development Engagement Framework

Organization	Focus Areas	Footprint	Relevant Programs	Potential Overlap with IEMD	Engagement Opportunity
Indy Economic Development Inc (IEDI)	Business attraction, retention, incentives	Citywide	Inclusive incentives via tax abatements	Offers commercial site support aligning with asset mapping/incentives	MOU for coordinated business attraction/retention, incentives & ED manager role
Indiana Economic Development Corp (IEDC)	State-level incentives, capital access, site selection	Statewide	READI grants, Legend Fund, SBDC support, Site Search Tool	Major capital gap for loan/incentive guidelines	Marketing sites within IEMD, incentives coordination
City of Indianapolis – DMD	Land use, zoning, redevelopment, federally-funded programs	Citywide	Zoning/Land Use, Development Standards, City-owned Land Bank, Brownfields Remediation Funding, Certified Plans, Tax Increment Financing, Incentives, New Markets Tax Credits, HOME, CDBG	Overlap in asset mapping and incentive guidelines	- Data sharing (property data, funding data) - TIF District Committee Involvement (Hillside HOTIF, Twin Aire, North Mass, Near Eastside, etc) - Collaborating on CBAs and incentives for economic development projects - Corridor development standards - Facade Grants
CIRDA	Regional development planning and funding	Central Indiana	READI 2.0, regional planning, infrastructure and placemaking initiatives, Climate Action Plan	Access to regional funding opportunities and coordination	Coordinate grant applications and strategic alignment for site reuse and infrastructure funding
Indy Partnership	Regional business attraction, marketing	Central Indiana	Site marketing, business attraction pipeline, data research, PR	Supports site marketing and can extend visibility of EEMD opportunities	Joint marketing of sites, align marketing materials with asset mapping

Central Indiana Corporate Partnership (CICP)	Sector-based initiatives, innovation economy, talent pipeline	Central Indiana	BioCrossroads, AgriNovus, Conexus, Ascend Indiana	Connects employers and talent with place-based investment goals	Convene sector-specific employers for hiring, business development & job creation within EEMD
LISC Indianapolis	Equity, technical assistance, corridor support	Citywide with Eastside focus	Microenterprise navigator, real-estate grants	Supports microbusinesses and commercial rehab aligned with EEMD asset mapping	Joint TA delivery through ED manager role

INDYEAST
ECONOMIC MOBILITY DISTRICT

INDUSTRY-RECOGNIZED CERTIFICATES & TRAINING STIPENDS

MANUFACTURING

CERTIFICATION	AVERAGE SALARY	COST	DURATION	ESTIMATED STIPEND
Commercial Drivers License (CDL)	$46,102	$5,070	4 Weeks	$2,880
Forklift Operator	$39,000	$360	2 Days	$288
MSSC Certified Logistics Technician	$36,980	$4,550	35 Hours	$630

CONSTRUCTION

CERTIFICATION	AVERAGE SALARY	COST	DURATION	ESTIMATED STIPEND
NCCER Core	$38,630	$1,175	40 Hours	$720
OSHA30	$85,859	$1,299	30 Hours	$540
Electrical Training Program	$45,000	$4,912	150 Hours	$2,700
Welding (AWS MIG Certification)	$40,000	$3,200	6 Months	$5,184
Apartment Maintenance Technician	$37,650	$3,087	80 Hours	$1,440
HVAC Technology Certificate	$56,300	$3,771	6 Months	$5,184
Landscape Bootcamp	$35,000	$2,250	8 Days	$576

HEALTHCARE

CERTIFICATION	AVERAGE SALARY	COST	DURATION	ESTIMATED STIPEND
Qualified Medical Aide	$35,291	$1,500	100 Hours	$1,800
Certified Clinical Medical Assistant	$43,500	$3,665	9 Months	$7,776
Certified Community Healthcare Worker	$38,520	$1,250	100 Hours	$1,800
Pharmacy Technician	$40,640	$2,125	4 Months	$3,456
Dental Assistant	$40,620	$4,277	9 Months	$7,776
Medical Coding	$44,580	$4,820	4 Months	$3,456
Phlebotomist	$37,908	$1,050	4 Weeks	$2,880

HUMAN SERVICES

CERTIFICATION	AVERAGE SALARY	COST	DURATION	ESTIMATED STIPEND
Child Development Associate (CDA)	$28,700	$3,811	3 Months	$2,592
IT Specialist Certification	$51,000	$4,103	1 Month	$864

*Cost = training price + assessment price
*Not an exhaustive list

IndyEast Economic Mobility District

Job Developer Job Description

Location: Indianapolis, Indiana

Position Type: Full-time, grant-funded

Salary: $65,000 annually, commensurate with experience

Employed By: Southeast Community Services

Primary Job Function:

A District-wide Job Developer will work across three Centers for Working Families (CWFs) in the IndyEast Economic Mobility District. The Job Developer guides workforce development strategy by (1) identifying employment sectors and employers able to hire people from target neighborhoods; (2) develops work experience opportunities and targeted professional training; (3) ensures credentialing is aligned with the needs and expectations of employers or other post-exit partners 4) and develops a job referral pipeline for CWF participants to ensure retention.

Program Implementation:

The Job Developer will work with CWF staff, key partners, and employers to assist CWF participants in obtaining living wage employment. The Job Developer will work to strengthen the local workforce sectors by increasing the employability and placement opportunities of jobseekers while simultaneously cultivating business relationships and providing employers with skilled applicants.

The Job Developer will work alongside EmployIndy to identify and recruit Employer Champions. Employer Champions serve as visible partners who model inclusive hiring, provide meaningful career pathways, and help coordinate with community organizations to reduce fragmentation across the workforce system. The role is responsible for becoming knowledgeable of employer needs, hiring practices, testing requirements, and employee retention plans; inform them of the incentives and the process for participating in on-the-job training, customized training, internships, apprenticeships, and other programs as applicable. The Job Developer will recruit and equip employer champions to co-design training, host Work Experience Learning (WEX), guarantee interviews with CWF participants, and oversee other high-impact/high-touch commitments to strengthen workforce development in the District. The Job Developer will maintain contact with employers during the hiring process and identify job seekers not hired and work with the assigned CWF coach and Retention Coach to improve the job seekers' employment competitiveness.

The Job Developer will track and document all services provided to clients and employers as well as progress towards all grant outcomes. They will also enter, organize, and maintain accurate data, reporting, and main files for all participants to successfully meet all grant outcomes. The Job Developer will also support the initiative's 5-year strategic plan and work closely with management to ensure alignment and consistent progress towards those goals.

Essential Functions:

- Placement & Retention (40%)
    - Provide contact with employers to stay informed on participants' progress on work sites.
    - Make appropriate referrals of program participants to employers and other service providers.
    - Maintain contact with employers and businesses which hired participants and for new employment.
- Relationship Building & Partner Coordination (40%)
    - Cultivate and maintain employer partnerships leading to living wage jobs from direct placements, hiring events, etc. as well connecting with various employer networks.
    - Promote program objectives through public presentations and other public relations activities.
    - Establish and maintain relationships with potential partners and seek collaborative opportunities which support the IEMD mission.
- Strategy & Alignment (15%)
    - Enter, organize, and maintain accurate data, reporting, and files for all participants aligned and leading towards successful grant outcomes, including administrative and compliance responsibilities.
- Continuous Improvement (5%)
    - Support management and the entire CWF team with assessment, planning, and improvement of the service delivery model and its execution.

Job Requirements

- 2-3 years of experience in workforce development, business-to-business services and customer care, with an emphasis on employer outreach and service to disadvantaged populations. Previous successful experience in job development, recruiting, and job retention services is highly desirable.
- Excellent working knowledge of the local business environment in Indianapolis-Marion County.
- General knowledge and understanding of the needs of a low-income working population
- 4-year degree preferred but significant professional experience (five years or more) may substitute at management's discretion.
- Excellent social/interpersonal skills and writing ability commensurate with the communication and reporting requirements.
- Proficiency in Microsoft Office Suite.
- Well-organized and self-directed.
- Reliable transportation, as this position requires regular local travel.
- Ability to speak Spanish preferred.

The preceding essential function statements are not intended to be an exhaustive list of tasks and functions for this position. Other tasks and functions may be assigned as needed to fulfill the mission of the organization.

Work Environment:

The IndyEast Economic Mobility District (IEMD) is a bold initiative designed to strengthen communities and stabilize families. In partnership with the John Boner Neighborhood Centers, Edna Martin Christian Center, Southeast Community Services, and residents from three neighborhoods (Near Eastside, Martindale Brightwood, and Southeast Indy), the IEMD will foster a vibrant local economy where all residents have access to the tools they need to thrive. This place-based initiative focuses on increasing economic mobility through coordinated investments in business development, workforce, housing, and infrastructure. Rooted in values of equity, intra- and intergenerational wealth creation, and access to opportunity, the IEMD brings together residents, community organizations, and institutional partners to drive long-term, inclusive change.

Indianapolis Barrier Buster Fund
Summary Report
2017-2025

Contents

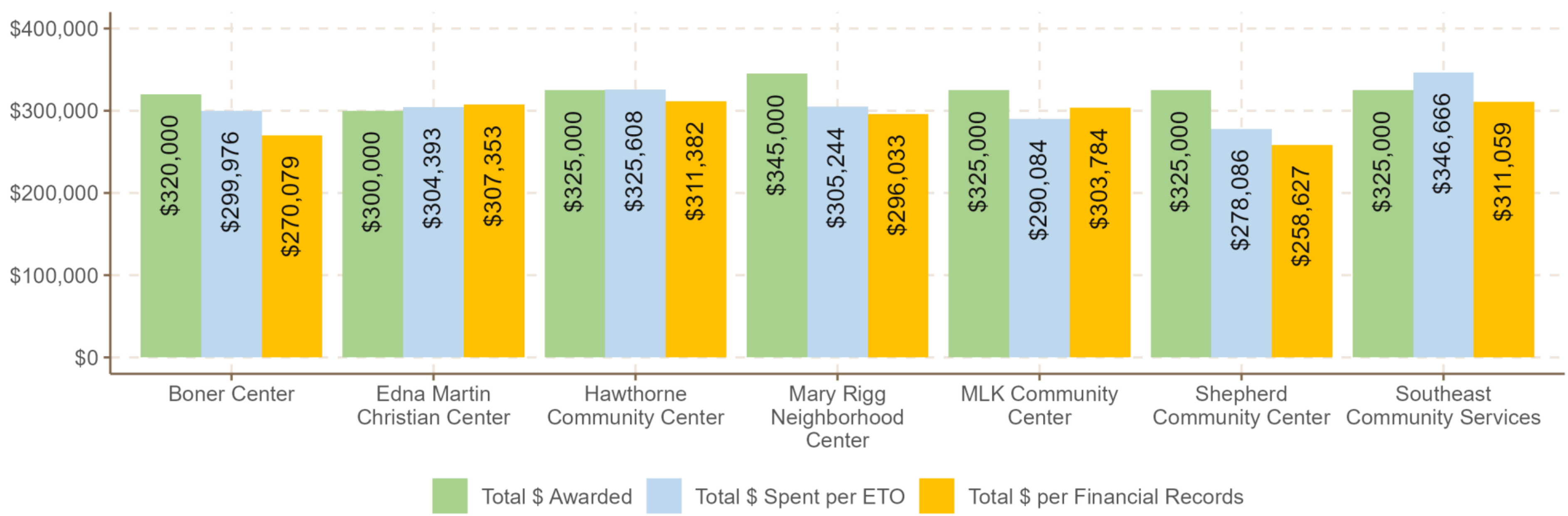
This report presents data from the inception of the Indianapolis Barrier Buster Fund (BB Fund) initiative, launched in 2017, through June 2025. It includes a summary of the reported financial spenddown, funds distributed (according to program data), and clients served, followed by an overview of completion rates by center for required outcome metrics. Financial reports and de-identified, participant-level data were submitted by each of the grantee organizations in August 2025 and analyzed by Community Solutions.

August 2025

BB Fund Financial Reports (January 2017- June 2025)

All Centers and Total (January 2017 – June 2025)	Total Award	Total Amount Spent		% Spent		Difference		
		ETO Data	Financial Records	ETO Data	Financial Records	Awarded vs ETO Data	Awarded vs Financial Report	ETO Data vs Financial Report
Total	**$2,265,000**	**$2,166,729**	**$2,058,315**	**96%**	**91%**	**$98,271**	$206,685	**$108,414**
Boner Center	$320,000	$299,976	$270,079	94%	84%	$20,024	$49,921	$29,897
Edna Martin Christian Center	$300,000	$321,066	$307,353	101%	102%	($4,393)	($7,353)	($2,960)
Hawthorne Community Center	$325,000	$325,608	$311,382	100%	96%	($608)	$13,618	$14,226
Mary Rigg Neighborhood Center	$345,000	$305,244	$296,033	88%	86%	$39,756	$48,967	$9,211
MLK Community Center	$325,000	$290,084	$303,784	89%	93%	$34,916	$21,216	($13,700)
Shepherd Community Center	$325,000	$278,086	$258,627	86%	80%	$46,914	$66,373	$19,459
Southeast Community Services	$325,000	$346,666	$311,059	107%	96%	($21,666)	$13,941	$35,607

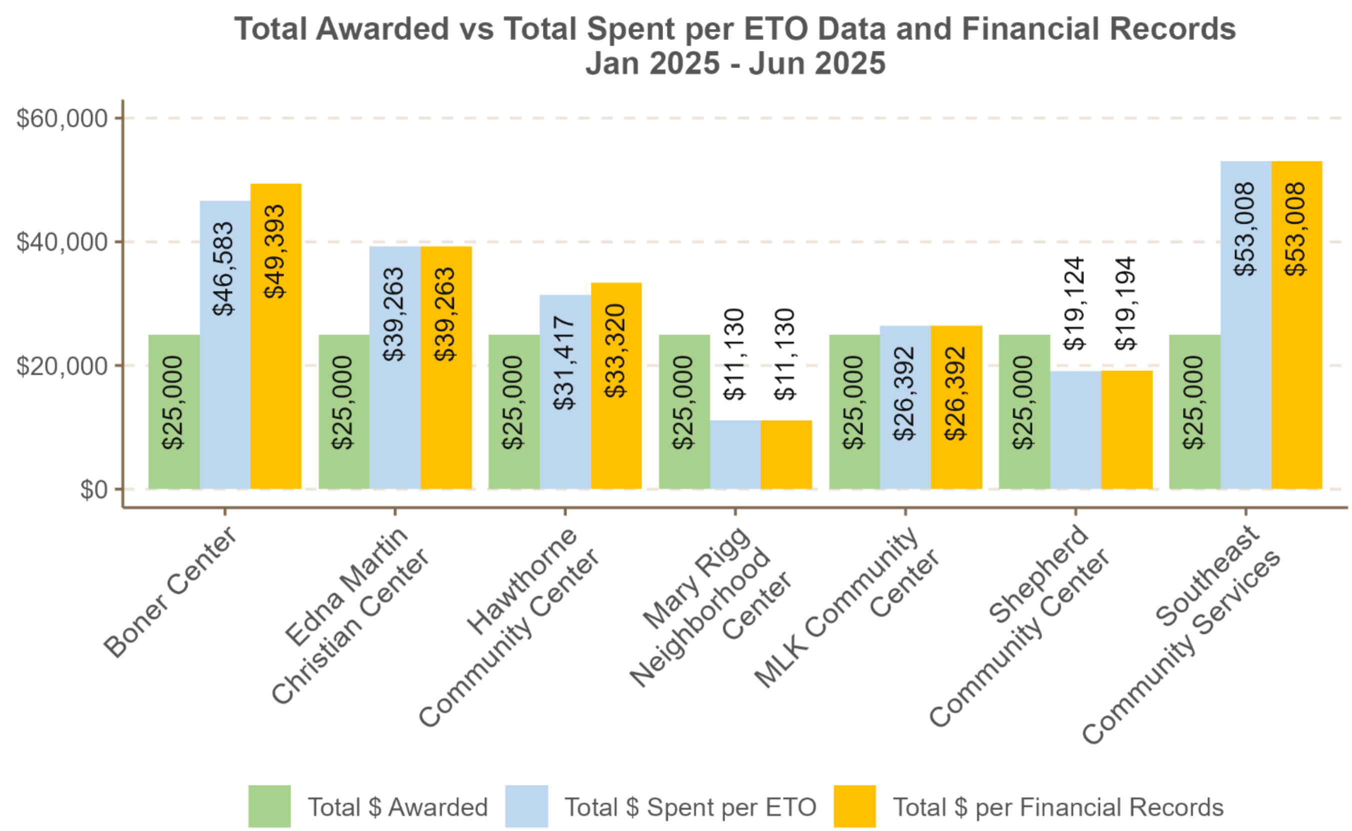
Total Awarded vs Total Spent per ETO Data and Financial Records
Jan 2017 - Jun 2025



2025 Data

The following table and charts summarize BB fund expenditures data from January 2025 to December 2025. This includes funds that were granted to agencies in 2024 but spent in 2025.

All Centers and Totals January-June 2025	Total $ Distributed	# Clients Served	# Payments	Avg $/ Client	Avg # Payments/client	Avg $/ Payment
Total	**$226,917**	**168**	**268**	**$1,351**	**1.6**	**$847**
Boner Center	$46,583	58	75	$803	1.3	$621
Edna Martin Christian Center	$39,263	36	51	$1,091	1.4	$770
Hawthorne Community Centers	$31,417	18	25	$1,745	1.4	$1,257
MLK Community Center	$26,392	4	15	$6,598	3.8	$1,759
Mary Rigg Neighborhood Center	$11,130	11	22	$1,012	2.0	$506
Shepherd Community Center	$19,124	22	30	$869	1.4	$637
Southeast Community Services	$53,008	19	50	$2,790	2.6	$1,060



Comparison: Jan – June 2024 vs Jan – Jun 2025

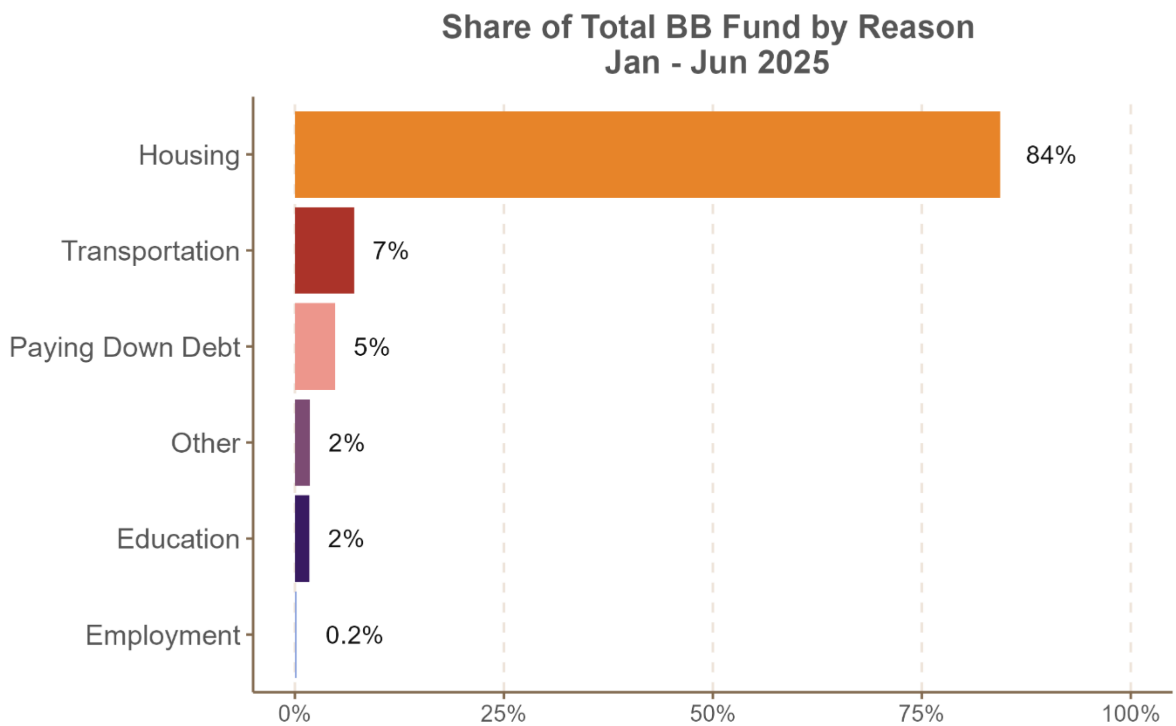
The following charts compare summary financial spending and client data during the first six months of 2024 with the first six months of 2025. BB fund spending has increased slightly in January through June 2025, compared to the first half of 2024. This is likely due to centers continuing to spend funds awarded in other periods.

All Centers and Totals Jan – Jun 2024 vs Jan – Jun 2025	Total $ Distributed		# Clients Served		# of Payments	
	Jan – Jun 2024	**Jan – Jun 2025**	Jan – Jun 2024	**Jan – Jun 2025**	Jan – Jun 2024	**Jan – Jun 2025**
Total	$218,383	**$226,917**	138	**168**	188	**268**
Boner Center	$63,497	$46,583	48	58	58	75
Edna Martin Christian Center	$55,685	$39,263	41	36	52	51
Hawthorne Community Center	$27,429	$31,417	10	18	10	25
Mary Rigg Neighborhood Center	$1,883	$26,392	3	4	4	15
MLK Community Center	$30,975	$11,130	3	11	18	22
Shepherd Community Center	$22,568	$19,124	27	22	33	30
Southeast Community Services	$16,301	$53,008	6	19	13	50

All Centers and Totals Jan – Jun 2024 vs Jan – Jun 2025	Avg $/Client		Avg # Payments/Client		Avg $/Payment	
	Jan – Jun 2024	**Jan – Jun 2025**	Jan – Jun 2024	**Jan – Jun 2025**	Jan – Jun 2024	**Jan – Jun 2025**
Total	$1,582	**$1,351**	1.4	**1.6**	$1,161	**$847**
Boner Center	$1,323	$803	1.2	1.3	$1,095	$621
Edna Martin Christian Center	$1,358	$1,091	1.3	1.4	$1,071	$770
Hawthorne Community Center	$2,743	$1,745	1.0	1.4	$2,743	$1,257
Mary Rigg Neighborhood Center	$628	$6,598	1.3	3.8	$471	$1,759
MLK Community Center	$10,325	$1,012	6.0	2.0	$1,721	$506
Shepherd Community Center	$836	$869	1.2	1.4	$684	$637
Southeast Community Services	$2,717	$2,790	2.2	2.6	$1,254	$1,060

Types of Expenditures of Barrier Buster Funds

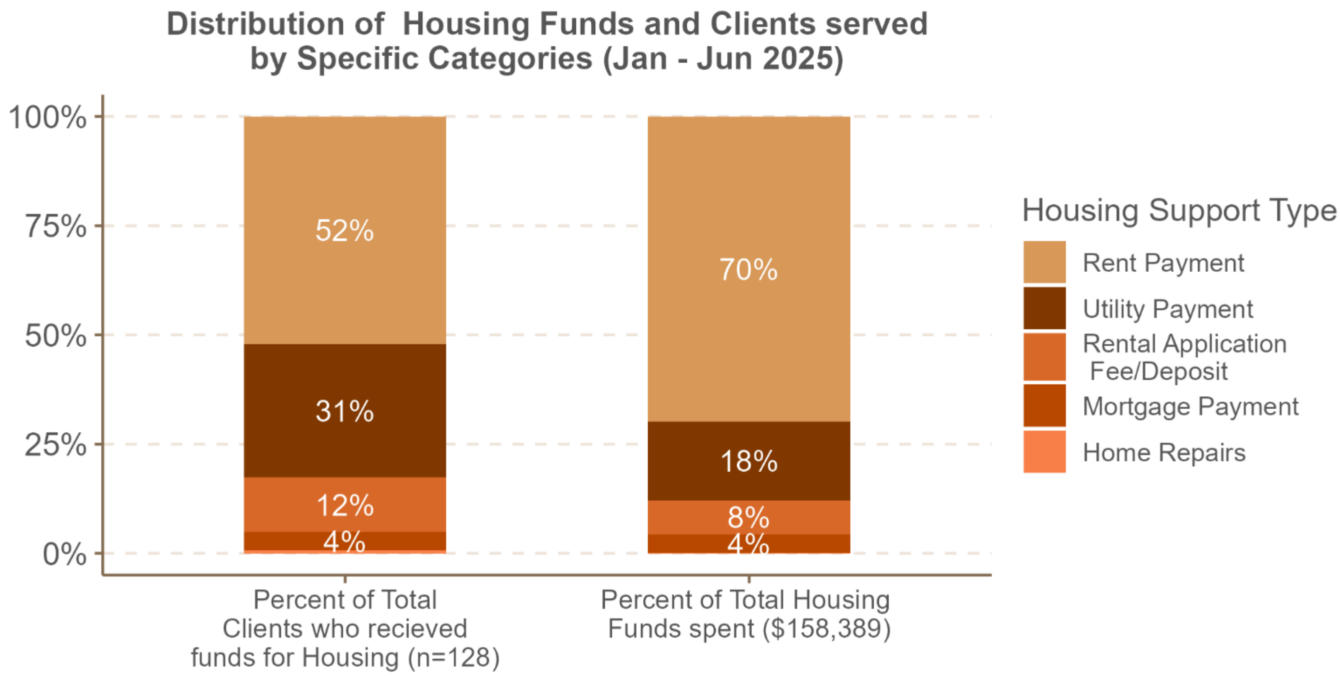
Case managers record the purpose of the expenditure each time they distribute a barrier-buster payment using a set of options or by writing in the reason if one of the existing options does not apply. This section provides information on the reasons for the barrier-buster expenditures for all payments made during January – June 2025.

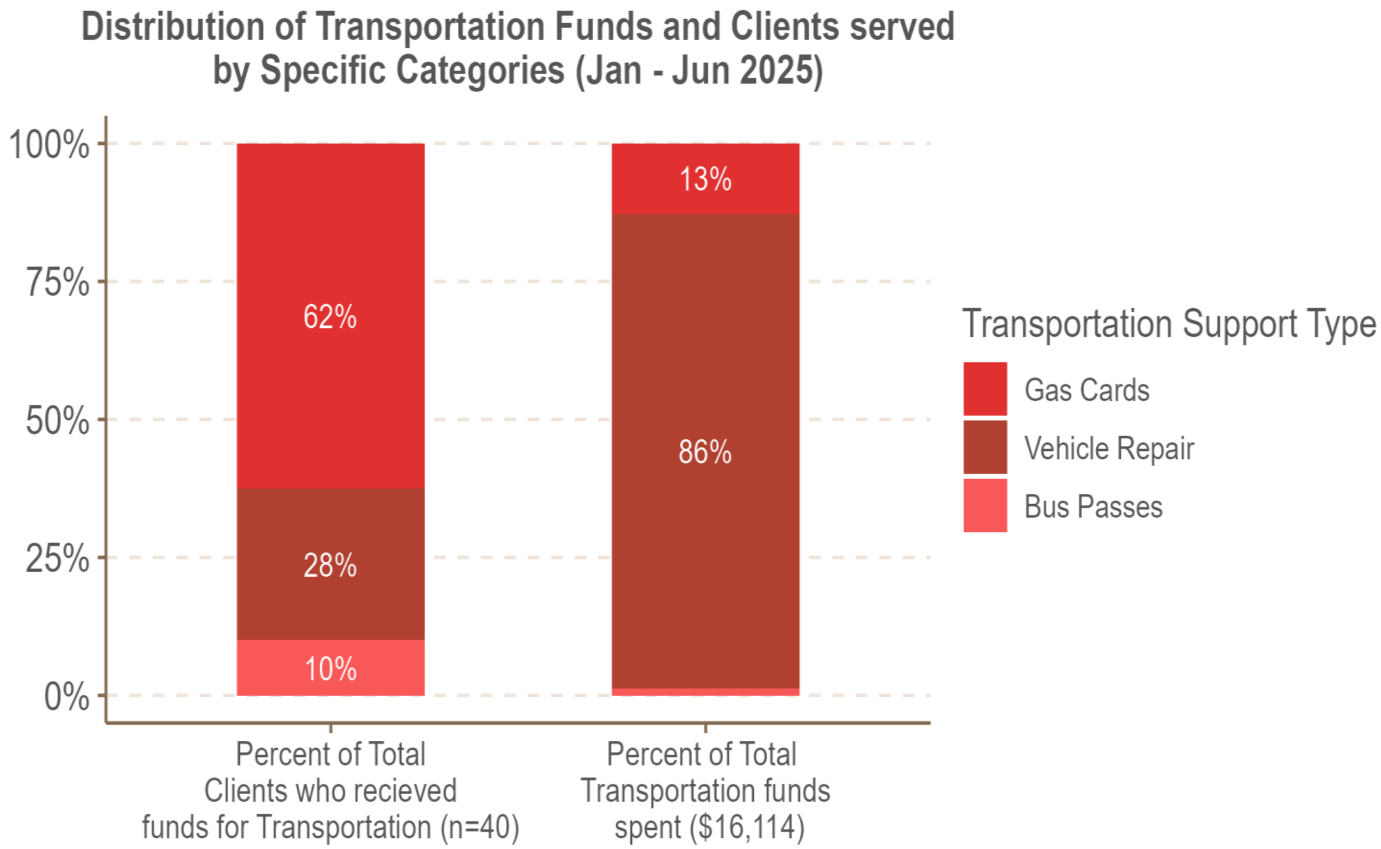


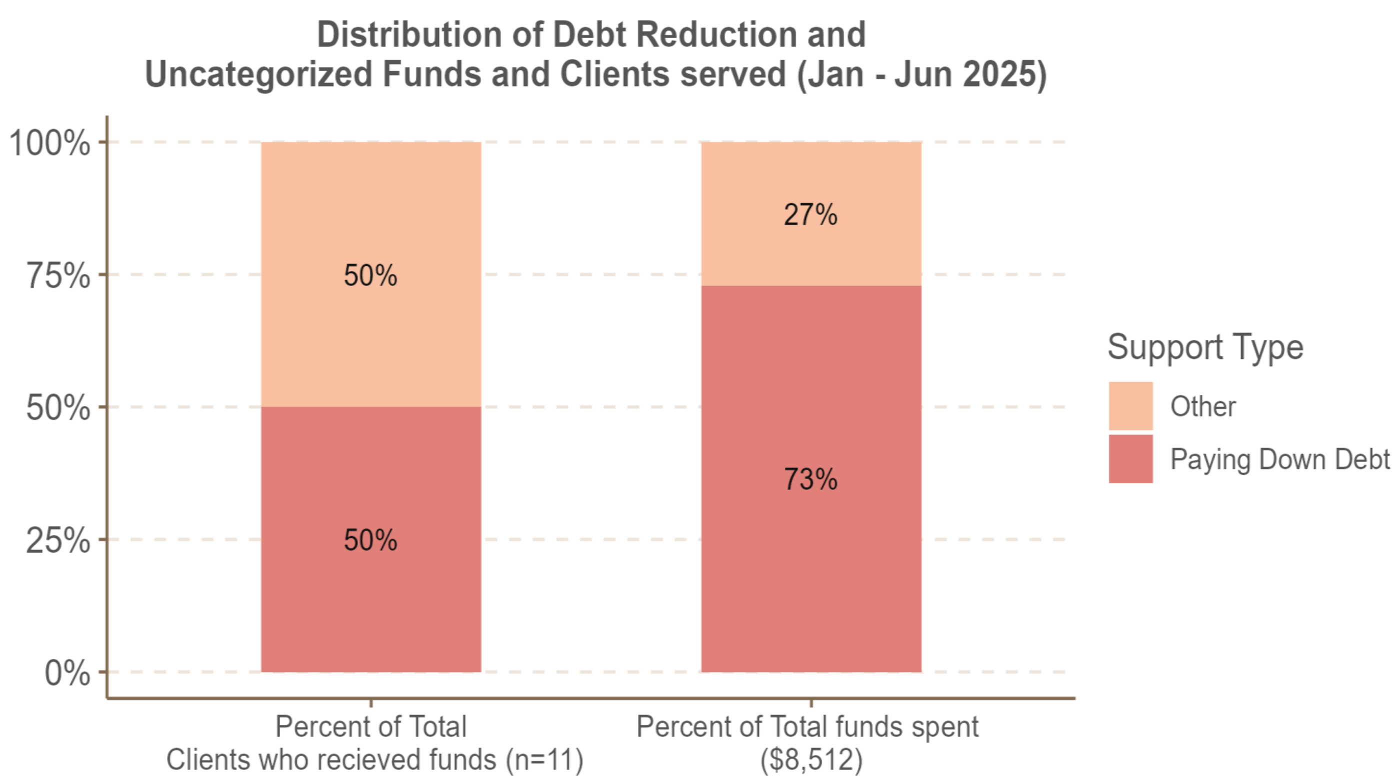
The following table shows the percentage of total funding each Center gave participants for the six categories stated above. The table is color-coded to highlight variation in the expense types, with the darker colors indicating that a higher share of funding was allocated for a particular expense type. In contrast, a lighter color indicates less funding allocated for that given reason. No shading indicates that the site directed 1% or less of its funding to a given category.

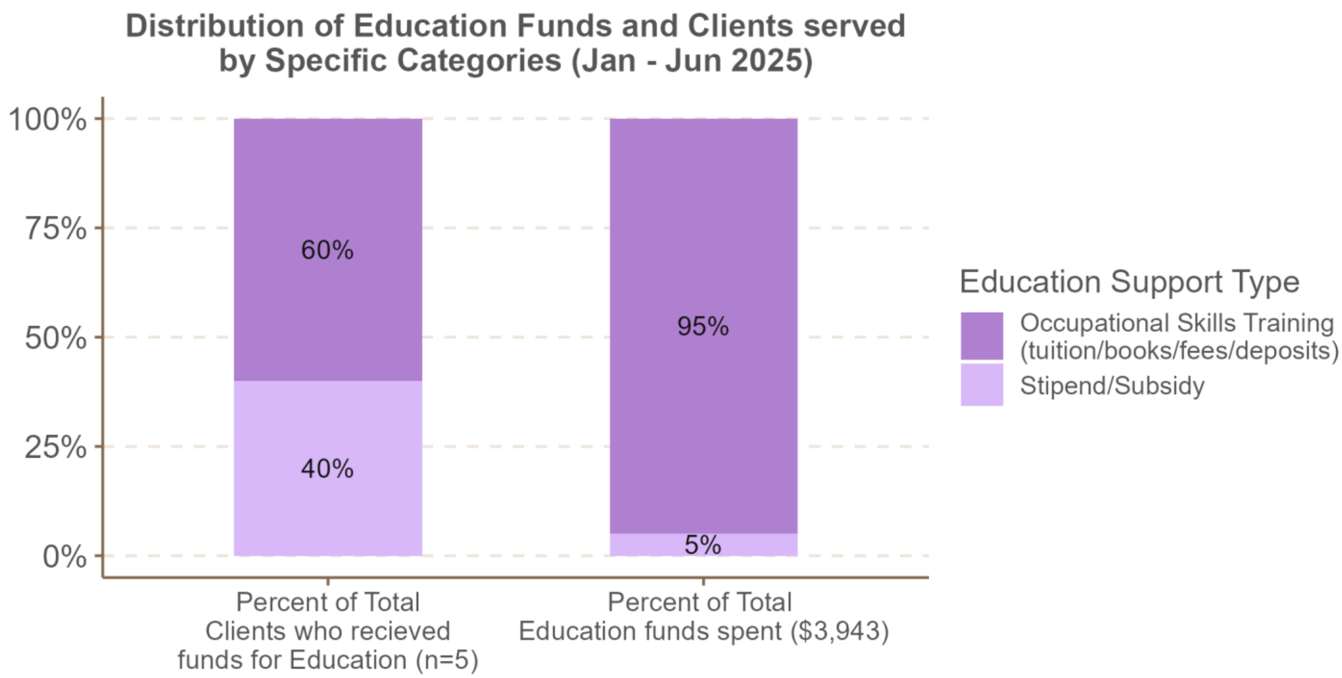
Site Name	Housing	Employment	Transportation	Debt Reduction	Education	Other
Boner Center	87%	0.7%	4%	1%	7%	0%
Edna Martin Christian Center	96%	0.3%	3%	0%	0%	1%
Hawthorne Community Centers	66%	0%	28%	0%	0%	6%
Mary Rigg Neighborhood Center	74%	0%	0%	21%	0%	5%
MLK Community Center	100%	0%	0%	0%	0%	0%
Shepherd Community Center	76%	0%	18%	2%	4%	0.3%
Southeast Community Services	82%	0%	2%	14%	0%	2%

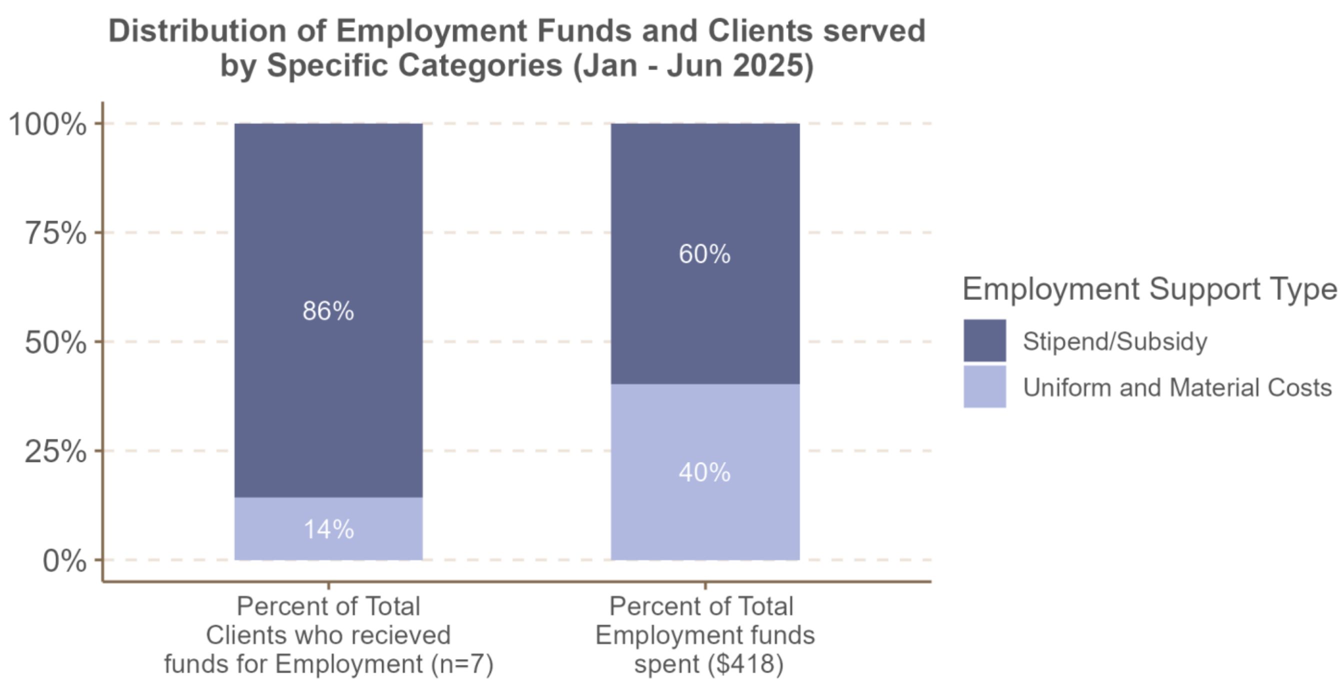
The following charts provide details on the expense types for which clients received barrier-buster funding. The left bar on each chart illustrates the share of clients who received a barrier-buster payment for each specific subcategory. In contrast, the right bar on each chart displays the share of funding allocated for each subcategory within its respective overall category. Reasons stated as “other” are not included in the charts below. “Other” expenses included items not listed in the existing response choices, such as legal fees (i.e., court or probation fees) and expenses to meet basic needs, such as grocery cards, clothing, or phone service for people who need access for employment or legal purposes.




Distribution of Transportation Funds and Clients served
by Specific Categories (Jan - Jun 2025)
100%
75%
50%
25%
0%
62%
28%
10%
13%
86%
Transportation Support Type
Gas Cards
Vehicle Repair
Bus Passes
Percent of Total
Clients who recieved
funds for Transportation (n=40)
Percent of Total
Transportation funds
spent ($16,114)


Distribution of Debt Reduction and
Uncategorized Funds and Clients served (Jan - Jun 2025)
100%
75%
50%
25%
0%
50%
50%
27%
73%
Support Type
Other
Paying Down Debt
Percent of Total
Clients who recieved funds (n=11)
Percent of Total funds spent
($8,512)


Distribution of Education Funds and Clients served by Specific Categories (Jan - Jun 2025)
100%
75%
50%
25%
0%
60%
40%
95%
5%
Percent of Total Clients who recieved funds for Education (n=5)
Percent of Total Education funds spent ($3,943)
Education Support Type
Occupational Skills Training (tuition/books/fees/deposits)
Stipend/Subsidy


Distribution of Employment Funds and Clients served by Specific Categories (Jan - Jun 2025)
100%
75%
50%
25%
0%
86%
14%
60%
40%
Percent of Total Clients who recieved funds for Employment (n=7)
Percent of Total Employment funds spent ($418)
Employment Support Type
Stipend/Subsidy
Uniform and Material Costs

Outcomes Data Reporting

In late 2023, the Indianapolis Barrier Buster Touchpoint was modified to collect new metric data. Data collected in the revised touchpoint has been used to assess these financial and social determinants of health metrics.

The core outcome metrics used by the Indy BB fund, established for 2024 and moving forward, include poverty index, savings, debt, housing stability, and employment data. Poverty index data is calculated from gross income and family size data entered into the touchpoint. The amount of savings and debt is collected when the touchpoint is completed, along with questions regarding the client’s housing situation, employment status, and whether the client's employment provides insurance. Additionally, data on Net Income, Net Worth, and Credit Score are still available. They can be collected while entering data into the Indy BB fund touchpoint or by using the CWF CFA.

To assess the impact of the barrier-buster funds on clients' financial well-being, the program sets baseline metrics for clients who have made two or more payments. The following metrics are reported for the 225 individuals who have received multiple payments since January 2024, which also includes 39 clients added in 2025. Those with fewer than two payments are excluded from the analysis.

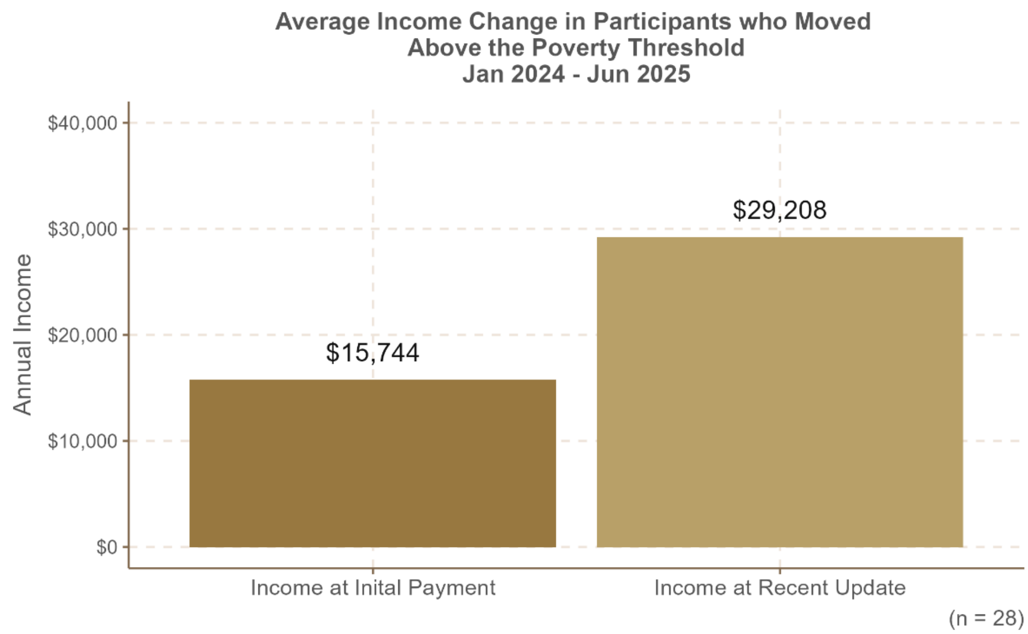
Baseline Statistics

Overall statistics at initial payment for 225 clients:

- 50% were living below the poverty threshold
- 36% were unemployed
- 13% reported not having stable housing
- 85% had no savings or cash set aside
- 31% did not have insurance
- Average debt per client: $26,774

Poverty Status

Of the 225 clients for whom we can measure outcomes, **28 clients (12%) moved above the poverty threshold.** Those who moved above the poverty line received an average of $2,265 over 2 subsequent barrier-buster payments. 64% of payments received by clients were housing-related, primarily for rent support. **These 28 clients saw a monthly income increase of $1,122, with their average annual income increasing from $15,744 to $29,208.**



Savings

192 clients did not have any money set aside at the time of their initial payment. **Thirty-six clients (18%) who initially had $0 in savings were able to save an average of $937 at their most recent update.** These clients were issued an average of $2,634 over an average of 4 barrier-buster payments. 45% of payments received by clients were housing-related, primarily for utility bills and rent support. 27% of payments received were for reducing debt.

Debt

At the initial payment, 93 clients (41%) had a total cumulative debt of $2,489,735, averaging $26,774 per person. **41 clients experienced a decrease in debt with subsequent payments. On average, these clients experienced a debt reduction of $8,740 with an average of 4 payments required to achieve this reduction.** The cumulative reduction in debt for clients was $358,325. 61% of payments received by clients were housing-related, split between rent and utility support.

Employment

For clients with 2 or more payments, 144 (75%) were employed at their first barrier-buster payment. Of these, 65% worked full-time, and their average annual income was $21,276. Additionally, **106 clients (73%) with subsequent payments saw their gross monthly income increase by $1,007 after an average of 3 barrier-buster payments.**

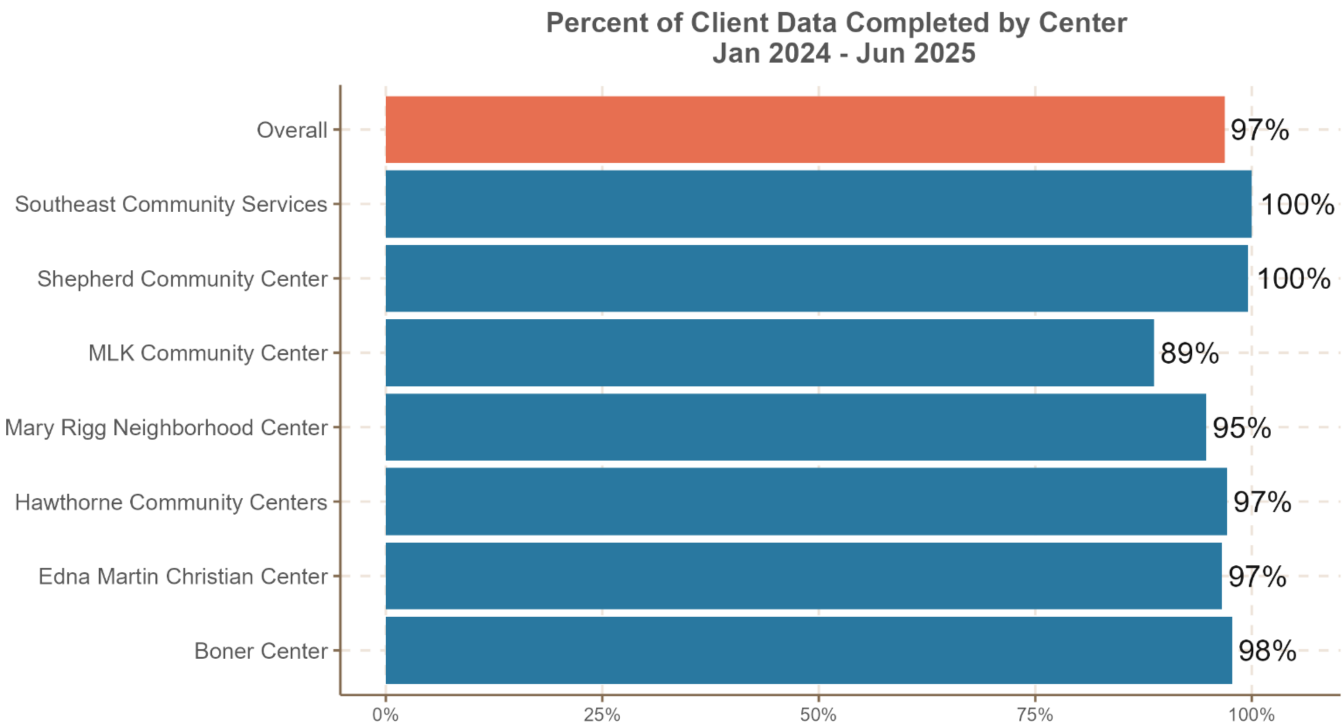
Housing

42% of payments for clients who were reported as having “stable housing” were for mortgages or rent. This would indicate that the “stability” level of their housing may be questionable.

Out of the clients with two or more payments, 16 clients who were not in stable housing at their initial payment experienced a positive change in housing with subsequent payments**. All 16 clients moved into stable housing and received an average of $2,359 over an average of 3 subsequent payments.**

Data Reporting Completion

Using the new tools and approach, organizations are expected to reach and maintain 85% data completion on required outcome metrics. Currently, the overall completion rate for baseline outcomes data is 97%. All organizations have surpassed the minimum threshold.



Key Findings

- Centers reported spending 91% of granted funds per spend-down reports submitted for January 2017 – June 30th, 2025
  - **Least:** Boner Center spent 84% ($290,079) of its funding
  - **Most:** Edna Martin spent 102% ($307,353) of its funding

- In 2025, the centers served 168 clients and made 268 payments (avg. $1,351) (1.6/person)
  - **Fewest:** Martin Luther King Center served 4 clients with 15 payments (3.8/person)
  - **Most:** Boner served 58 clients with 75 payments (1.3/person)
  - **Least** went to Education, Other, and Employment (2% or less for each)

- Centers reported distributing $226,917 from January to June 2025, which is more than the funds distributed from January to June 2024 ($218,383).

- Centers reported spending, on average, $1,351 per client January – June 2025.

- Centers reported an average payment of $847 in January – June 2025.

- Most payments made and funds distributed went to **Housing** (84%).

- **Outcomes:** 78% (175) of clients who had at least two payments between January 2024 and June 2025 experienced a positive impact in one or more of the following areas: debt reduction, housing stability, or improved poverty status.
  - 28 clients moved above the poverty threshold
  - 41 clients had a decrease in overall debt by an average of $8,740 by receiving an average of 4 BB Fund payments
  - 106 clients experienced an average monthly gross income increase of $1,007 after receiving an average of 3 BB fund payments.

Employer Engagement Strategy:

Building Quality Partnerships for Equitable Opportunity

I. Overview

EmployIndy's Business Partnership Team aims to connect Eastside residents to quality, career-advancing employment by cultivating strong, reciprocal relationships with employers that align with the Choice Employer criteria. The strategy establishes a structured process to identify, qualify, and grow employer relationships in and around the District, while honoring and building upon existing partnerships maintained by community-based organizations. The ultimate goal is to create a coordinated, inclusive system that produces consistent talent pipelines, work-based learning experiences, and sustainable wage growth for residents.

II. Guiding Principles

Good Jobs First – Prioritize partnerships with employers who demonstrate a commitment to job quality by aligning their practices with the four Choice Employer pillars: Career Pathways, Culture and Diversity, Employee Supports, and the Good Wages Initiative (GWI). We will use a rubric-based scale to assess each employer's alignment and identify those most committed to advancing job quality.

Currently, the GWI standard is $18/hour with benefits, though this threshold is under active review and expected to increase to approximately $22/hour. We are working in partnership with CICP and the Indy Chamber to finalize and publicly announce the updated benchmark.

Community Alignment – Leverage existing employer relationships built by trusted neighborhood partners and coordinate outreach to avoid duplication.

Data-Driven Development – Use EmployIndy's CRM and labor market analytics to identify and monitor employers along a structured engagement continuum. To strengthen this data-informed approach, we would like the opportunity to utilize funds to purchase LMI system licenses for three members of our Business Development team at an estimated $15,000. These licenses will provide critical access to real-time labor market information and sector insights.

Sector Focus and Measurable Results – Target four key industries—Healthcare, Manufacturing, Construction, and Human Services—that show strong job demand and alignment with residents' skill-building potential.

III. Employer Readiness Process

Before formal engagement, each prospective employer partner will undergo a readiness and suitability assessment to ensure alignment with the initiative's job quality and workforce priorities.

Step 1: Preliminary Screening

- Confirm the employer operates within or near the designated Eastside zip codes.
- Verify industry alignment (Healthcare, Manufacturing, Construction, Human Services).
- Review company size, workforce demand, and job posting trends.

Step 2: Good Wages Initiative Alignment

- Evaluate compensation, benefits, and advancement opportunities against EmployIndy's GWI criteria.
- Confirm the ability to provide a living wage and benefits consistent with Choice Employer standards. This would not eliminate a potential partner but could factor into types of engagement opportunities as well as "champion" status.

Step 3: Workplace Culture and Inclusivity Assessment

- Gauge openness to inclusive hiring practices (e.g., reentry or second-chance employment).
- Assess capacity to host trainees and provide supervision, mentoring, or WBL opportunities.
- Identify job readiness competencies by occupation and employer. EmployIndy will document these competencies to ensure alignment between employer expectations and CBO-led assessment and readiness efforts.

Step 4: Capacity and Commitment Review

- Evaluate hiring projections, workforce turnover, and ability to participate in WBL.
- Confirm willingness to engage in roundtables, advisory input, and curriculum feedback.
- Coordinate with EmployIndy and community partners to avoid duplication.

Step 5: Partnership Onboarding

- Document commitments via a standardized MOU for work-based learning engagements.

- Add the employer to the CRM to track items such as contact history, activity engagement types, and follow-up schedule. Conduct an onboarding meeting or site visit to establish communication protocols and feedback loops.

This structured process ensures that employer partners are both mission-aligned and equipped to provide sustainable, quality employment opportunities.

IV. Targeted Training Goals

Following this structured readiness process, EmployIndy will strategically engage employers who demonstrate alignment with job quality priorities and sector-specific workforce needs. These partnerships are essential to advancing the District's talent pipeline and ensuring that training investments translate into real employment outcomes. To that end, EmployIndy's Business Partnership Team will support the following annual trainee goals:

- 50 Healthcare trainees (CNA, MA, QMA)
- 25 Manufacturing trainees (Certified Production Technician, CNC)
- 25 Construction trainees (NCCER, Maintenance Tech)
- 20 Human Services trainees (Case Management, Customer Service)

In addition to these trainee outcomes, EmployIndy will build employer partner capacity to support the District, ensuring deepest engagement of a minimum of five employers per sector.

V. Employer Engagement Continuum

Building on the employer readiness assessment and sector-specific training goals, EmployIndy will implement a multi-year engagement strategy to cultivate and strengthen employer partnerships across the Eastside.

In Year 1, EmployIndy will conduct a landscape analysis to establish a baseline of employer relationships currently held by EEMD partners and assess the density of engagement. From this analysis, baseline metrics will be determined for total number of employers currently engaged; number needed at each level of the employer continuum; number of employers by sector needed to offer work-based learning experiences; and number of employers meeting current wage standard and number of employers needed as designated champions.

Over the next four years, EmployIndy will seek to increase engaged employers by 20%, active employers by 10% and secure at least 1 employer champion for the district per sector in **year 2**. In **year 3**, increase engaged employers by 30% and increase active employers by 20% while adding at least 1 additional employer champion per sector. In **year 4**, EmployIndy seeks to maintain at least 70% engagement of engaged and active employers while adding an additional employer champion per sector. By year 5, secure at least 5 champions per sector.

To support these multi-year goals and track progress over time, employers will advance through clearly defined stages of engagement, monitored within EmployIndy's CRM system: Prospect → Engaged Partner → Active Partner → Champion. Examples of this continuum could be defined as:

- Prospect: Identified as a potential employer based on sector and geography.
- Engaged Partner: Participates in discussions, hiring events, or roundtables.
- Active Partner: Collaborates actively on training or hiring initiatives. Host and/or hire at least 2 trainees or other EEMD referrals per year.
- Champion: Sustained, high-impact partnership with guaranteed interviews, paid WBL, alignment with Choice Employer priorities, host and/or hire at least 5 trainees or other EEMD referrals per year

Each employer's stage, communication history, placements, and outcomes will be tracked in EmployIndy's CRM with reporting to measure progress, impact, and retention.

VI. Communication, Hiring Events, and Continuous Feedback

To strengthen collaboration and streamline communication, the District will implement a multi-channel engagement system:

- District-Specific Hiring Events: Host 2 targeted hiring and networking events at EEMD partner locations for business partners, allowing employers to meet trainees, conduct on-site interviews, and collaborate with EmployIndy and community partners.
- Continuous Feedback Loop: Establish a structured feedback system connecting employers, trainees/employees, community partners, and EmployIndy to share updates, resolve challenges, and improve processes in real time.
- Quarterly "District Workforce Briefing" Newsletter: Highlights training outcomes, employer spotlights, and upcoming opportunities.
- Biannual Employer Roundtables: Facilitate collaboration, data-sharing, and curriculum alignment.
- Monthly Community Partner Coordination Calls: Keep EMCC, JBNC, SECS, and EmployIndy aligned on employer leads and training outcomes.
- Annual "State of the Workforce District" Report: Recognize Employer Champions, celebrate milestones, and plan for the upcoming year.

This system ensures a consistent two-way flow of communication, enabling employers to share hiring needs quickly while partners and trainees gain visibility into opportunities and feedback from participating businesses.

VII. Enhancing District Capacity Beyond Employer Partnerships

EmployIndy anticipates a phased implementation approach, beginning with foundational activities in Year 1 to establish employer partnerships, align community-based organizations, and refine sector strategies. While full-scale training programs are scheduled to launch in Fall 2026, early efforts will focus on deepening employer engagement, identifying job readiness expectations, and equipping CBOs to prepare participants for future work-based learning opportunities.

To support this early ramp-up and ensure meaningful engagement for participants, EmployIndy will also activate its broader talent strategies around work experiences and talent connection. These initiatives will offer hands-on career exposure, job placement services, and structured pathways from training to employment, helping bridge the gap between workforce preparation and industry demand.

Work-Based Learning

To provide work-based learning activities, EmployIndy will activate its Talent Bound framework as a bridge between training and employment. By aligning career preparation with employer demand, hosting district-specific hiring events, and maintaining a real-time feedback loop among employers, partners, and EmployIndy, the District will build a sustainable, equitable workforce ecosystem. This approach transforms short-term training into long-term career stability—advancing the Eastside Economic Mobility District's mission to connect residents to meaningful work, support employer competitiveness, and cultivate shared prosperity across Indianapolis's Eastside.

This strategy also builds on EmployIndy's Talent Bound career-connected learning framework, which guides young people through the stages of exploration, engagement, and experience. The Business Partnership Team applies these same principles to adult workforce programming, creating a clear, evidence-based pathway from learning to employment. These activities could include exploration through employer panels that allow for industry exploration and insights into industry expectations. Engagement activities such as industry tours allow insights into the day to day activities at a worksite and an experience through paid on-the-job training for identified trainees; while others may transition into direct employment

This adult adaptation of the Talent Bound model allows the team to provide a structured bridge from training to career placement, ensuring that participants are not only qualified for high-demand roles but also supported and prepared to succeed and grow within them. We will collaborate with CBOs to determine the percentage of trainees who will participate in a work-based learning experience. In turn, employers benefit from a stronger, more reliable local talent pipeline with reduced onboarding costs and improved retention outcomes.

Talent Connection

To support seamless transitions from training to employment, EmployIndy will deploy its Talent Connection team to provide job placement services for trainees who are not immediately hired upon program completion. This team serves as a dedicated recruitment function, connecting job-ready residents to quality employment opportunities.

Talent Connection differs from the role of career coaches and job developers embedded within community-based organizations. While career coaches focus on participant readiness (e.g., goal setting, barrier removal, and support services) and job developers focus on generating employer leads within specific CBO networks, Talent Connection functions as a centralized placement team. They work across employer partnerships to pre-screen candidates, match them to open roles, and support onboarding—ensuring a tighter feedback loop between training, coaching, and hiring outcomes.

The Talent Connection team will assist with post-training placement services to ensure that all program completers receive support—even those not hired right away. This includes matching trainees to roles that reflect both employer needs and Choice Employer criteria, such as good wages, advancement pathways, and inclusive practices.

To strengthen these outcomes, EmployIndy will also implement a placement funnel that reflects the likelihood of each participant transitioning into either paid work-based learning or direct employment. This funnel will be informed by individual readiness, sector-specific demand, and employer hiring preferences—enabling a more efficient and intentional match between Eastside talent and available job opportunities.

VIII. Conclusion & Budget Considerations

The Eastside Economic Mobility District strategy represents a bold and collaborative effort to connect residents to high-quality careers, strengthen employer partnerships, and build a more inclusive, equitable workforce ecosystem. By aligning employer engagement, talent development, work-placed learning, and job placement strategies under a unified framework—supported by initiatives like Choice Employers, Talent Bound, and Talent Connection—EmployIndy is prepared to lead the coordination necessary to meet the District's long-term goals.

To implement this strategy, the core projected budget includes staffing and operational costs for Executive Leadership and the Business Partnership Team—critical roles that will lead coordination, employer engagement, and strategic oversight. These baseline costs reflect the foundational capacity needed to build and sustain employer relationships across sectors and drive job quality outcomes.

In addition, we have identified key supplemental investments that would significantly enhance the District's impact and operational effectiveness. These include a Talent Bound Manager, who would lead alignment with community-based organizations and coordinate meaningful work-based learning experiences tailored to sector needs. A Recruitment Manager would oversee Talent Connection activities, providing targeted job placement support for trainees not immediately hired upon completing their training—ensuring continued momentum toward sustainable employment.

To guide these efforts with timely, sector-specific insights, we will require continued investment in a Labor Market Information (LMI) system to ensure all partners operate from a shared, data-informed understanding of high-demand occupations and evolving employer needs. In addition, there is a critical need for a CRM/Case Management system to support coordination across partners, track employer engagement, and monitor participant progress. While the total cost of this system is still being determined, it will be essential to maintaining visibility, accountability, and alignment throughout the District initiative.

These additional requests represent the resources needed to fully realize the strategy's vision and ensure participants experience seamless transitions from training to employment.

EmployIndy is committed to maximizing outcomes and demonstrating the return on investment through clear metrics, continuous feedback, and sustained employer and community engagement.

INSPIRING CAREERS THROUGH EXPLORATION

Talent Bound connects employers and educators to provide opportunities for Indy youth and young adults to engage in rigorous career experiences that develop in-demand skills and inform education and career decisions.

As a work-based learning initiative overseen by EmployIndy, Talent Bound helps Indy youth and young adults actively pursue integrated academic and career experiences that empower them to follow career pathways that lead to economic mobility and future prosperity.

CAREER EXPLORATION

IN THE CLASSROOM

TALENT TALK	Classroom Presentations	Share information about an industry, career, or business
TALENT PREP	Interview Preparation	Work with a young person to conduct mock interviews and resume reviews
TALENT DAY	Career Fairs	Share information about a specific company, workplace responsibilities, and job skills
TALENT MENTOR	Meetings	Work one-on-one or with a small group to explore career paths

CAREER ENGAGEMENT

INTERACTIONS & VISITS

TALENT TOUR	Workplace Tours	Demonstrate work in progress for individuals to learn about the business, meet employees, and ask questions
TALENT SHADOW	Job Shadows	Host a hands-on, one-on-one experience of daily workplace responsibilities
TALENT CHALLENGE	Group Projects	Review presentations about possible solutions to real-world issues

CAREER EXPERIENCE

PAID WORK EXPERIENCE

TALENT HIRE	Employment	Connect to a talent pipeline for full-time and part-time employment and influence employee skillsets
TALENT INTERN	Internships	Provide short-term, paid employment opportunities with practical applications and skills development
TALENT APPRENTICE	Apprenticeships	Combine paid employment with on-the-job learning and classroom-based instruction leading to an industry recognized credential

GO TO TALENTBOUND.ORG TODAY TO GET STARTED

Modern Apprenticeship FOR HIGH SCHOOL STUDENTS · PROJECT indy MAYOR JOE HOGSETT'S YOUTH JOBS INITIATIVE · JAG Indiana · YES INDY · Indy Achieves · JobReady indy

IndyEast Economic Mobility District

Retention Coach Job Description

Location: Indianapolis, Indiana

Position Type: Full-time, grant-funded

Salary: TBD annually, commensurate with experience

Employed by: John Boner Neighborhood Centers, Southeast Community Services, and Edna Martin Christian Center (3 positions)

Primary Job Function:

IndyEast Retention Coaches will lead the workforce retention component across the IndyEast Economic Mobility District by being embedded within each of the three Centers for Working Families (one coach per center). Each coach provides long-term retention and advancement coaching to participants who have secured entry-level employment and supports them in developing a path toward higher-wage careers.

Program Implementation:

The Retention Coach's work focuses on post-training career retention and advancement for participants served by a CWF. This position provides direct coaching to CWF clients who have obtained entry level employment to assist them with the development of a career plan to advance to a living-wage job. The Retention Coach is responsible for assisting clients in developing a plan of action to help them reach their career goals and improve financial stability. The Retention Coach, in coordination with the Job Developer, will also work directly with employers to ensure advancement opportunities for $20 an hour or beyond wages. The Retention Coach will work closely with CWF coaches to address barriers to employment retention as well as opportunities to capitalize financially on promotions and advancements. The Retention Coach may work with clients still enrolled in classes at a CWF or training providers to upskill clients.

Essential Functions:

- Advancement & Retention (40%)
    - Assess individuals for additional training and coordinate programming with Career Coach to make appropriate client upskilling.
    - Follow-up to client for 18-36 months after job placement to ensure a strong connection with the financial coach and to ensure client is moving along a career pathway.
- Relationship Building (40%)
    - Assist in the development and monitoring of job contracts with employers for each individual participant.
    - Coordinate with CWF Coach to provide support services and Barrier Busting funds.

    - Provide one-on-one individual coaching in current job and activities outlined in skill development plan.
    - Maintain and expand existing links to community resources and partners to further the goals of the program to foster the success of participants.
- Strategy & Alignment (15%)
    - Enter, organize, and maintain accurate data, reporting, and main files for all participants aligned and leading towards successful grant outcomes, including administrative and compliance responsibilities.
- Continuous Improvement (5%)
    - Support management and the entire CWF team with assessment, planning, and improvement of the service delivery model and its execution.

Job Requirements

- 2-3 years of experience in workforce development, business-to-business services and customer care, with an emphasis on employer outreach and service to populations with barriers. Previous successful experience in job development, recruiting, and job retention services is highly desirable.
- Excellent working knowledge of the local business environment in Indianapolis-Marion County.
- General knowledge and understanding of the needs of a low-income working population
- 4-year degree preferred but significant professional experience (five years or more) may substitute at management's discretion.
- Excellent social/interpersonal skills and writing ability commensurate with the communication and reporting requirements.
- Well-organized and self-directed.
- Reliable transportation, as this position requires regular local travel.
- Ability to speak Spanish preferred.

The preceding essential function statements are not intended to be an exhaustive list of tasks and functions for this position. Other tasks and functions may be assigned as needed to fulfill the mission of the organization.

Work Environment:

The IndyEast Economic Mobility District (IEMD) is a bold initiative designed to strengthen communities and stabilize families. In partnership with the John Boner Neighborhood Centers, Edna Martin Christian Center, Southeast Community Services, and residents from three neighborhoods (Near Eastside, Martindale Brightwood, and Southeast Indy), the IEMD will foster a vibrant local economy where all residents have access to the tools they need to thrive. This place-based initiative focuses on increasing economic mobility through coordinated investments in business development, workforce, housing, and infrastructure. Rooted in values of equity, intra- and intergenerational wealth creation, and access to opportunity, the IEMD brings together residents, community organizations, and institutional partners to drive long-term, inclusive change.

Each organization can restructure this job description to fit formats, structures, and wording that they use for other job postings.

Workforce Development IMPLEMENTATION TIMELINE

2026 to 2031

ALL 5 YEARS

- Incentivize Local Hiring
- Strong Employment Pipelines
- Career advancement towards living wage jobs
- Improved economic security for families
- Ensure basic needs are met

2026

HIRE
- Job Developer
- Retention Coaches

PLAN
- Industry Recognized Certificates Implementation
- CWF capacity needs
- Landscape Analysis for Employer Champions

LAUNCH
- Training Opportunities
- WEX placements

COMPLETE
- Initial Barrier Busting Funds administered
- Training stipends administered

2027

PLAN
- WEX placements
- Employer Champions training
- Employer Roundtables

EXPLORE
- Additional Employer Champions

EVALUATE
- WEX retention
- Job retention

COMPLETE
- Training stipends
- Barrier Busting Funds
- Initial Certifcations

2028

PLAN
- WEX Placements
- Additional training opportunities

EVALUATE
- Job Retention
- WEX retention
- Employer Champions

COMPLETE
- Training stipends
- Barrier Busting Funds
- Certifications
- WEX placements

2029

PLAN
- WEX placements
- Additional training opportunities

EVALUATE
- Job retention
- WEX retention
- Employer Champions

COMPLETE
- Training stipends
- Barrier Busting Funds
- Certifications
- WEX placements

2030

PLAN
- Final WEX placements

EVALUATE
- Job retention
- WEX retention
- Employer Champions

COMPLETE
- Training stipends
- Barrier Busting Funds
- Certifications
- WEX placements

2031

COMPLETE
- 40 WEX placements
- 600 CWF Participants Certified
- 20 Employer Champions retained

IEMD Evaluation Plan
2026-2030

Submitted
February 17, 2026

Table of Contents

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.

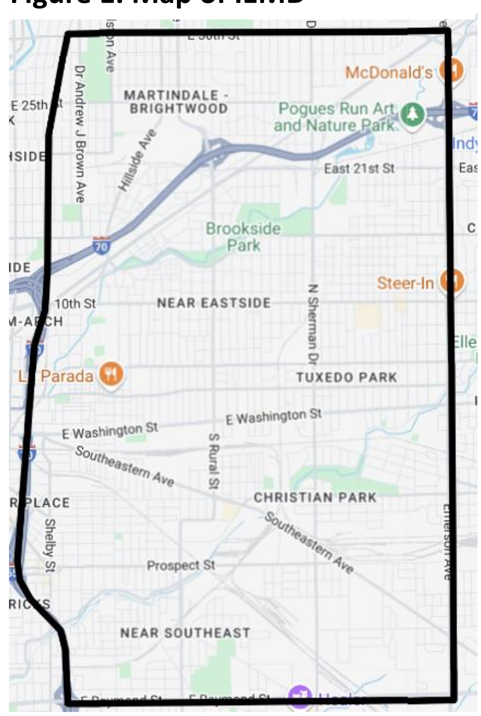
This evaluation is intended to support the implementation of IEMD strategies by offering a structure for monitoring progress and organizing shared reflection over time. It is designed to align with the initiative's focus areas in economic development, housing, and workforce development, while remaining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

Figure 1. Map of IEMD



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 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.

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	

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.

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 *(e.g., # of local jobseekers receiving priority interviews)*	**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: Predevelop-ment 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 *Included conditionally, pending award and final program structure.*	Pending: Units developed in accordance with New Markets Tax Credits requirements *Included conditionally, pending award and final program structure.*
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	*Among those supported…* **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	*Outcomes tied to development timeline and construction schedule; project schedule may extend beyond grant period.*
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:** *TBD indicators tied to retention outcome coaches, may vary by community center* **WD6.2:** *TBD indicators tied to Job Developer role*	**WD6(a):** *Final indicators TBD, pending job descriptions, but anticipate will be tied to improved employment outcomes relative to temporal or comparative benchmark(s).* **WD6(b):** *Final indicators TBD, pending job descriptions, but anticipate will be tied to expanding workforce opportunities for community center participants within the district*
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 *Included conditionally, pending award and final program structure.*
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 *Included conditionally, pending award and final program structure.*

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.
CBDO Capacity Building H7(a): Change in organizational capacities relative to baseline assessments and/or documentation of need in grant request.	Programmatic	CBDOs	Semi-annual	CBDOs	Presumes CBDO 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.
CBDO 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	CBDOs	Annual	CBDOs	Presumes CBDOs 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	*TBD indicators tied to retention outcome coaches, may vary by community center*
Workforce Coordination Team WD6.2: Job Developer activities	Programmatic	Grant Reporting	Quarterly	Community Centers | Workforce Administrator	*TBD indicators tied to Job Developer role*
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. *% hired by WEX provider after training & % hired within industry after training*	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)**.

Memorandum of Understanding ("MOU") Between The John H. Boner Community Center, Inc. (DBA "John Boner Neighborhood Centers" and "JBNC") and Edna Martin Christian Center, Inc. (EMCC) and Southeast Community Services, Inc. (SECS)

The John Boner Neighborhood Centers, Edna Martin Christian Center, and Southeast Community Services enter into this Memorandum of Understanding (MOU) with a shared commitment to advancing the goals of the IndyEast Economic Mobility District (IEMD).

Section 1: Statement of Shared Values

Our collaboration is rooted in the following shared values, which will guide our work together:

1. Opportunity for All
   We believe that every neighbor deserves access to opportunity, regardless of their background or circumstances. Our work is centered on removing barriers, addressing disparities, and creating pathways that enable all residents to thrive.
2. Collaboration and Trust
   We value deep, authentic collaboration built on mutual respect, transparency, and trust. We commit to open communication, shared decision-making, and accountability to each other and to the communities we serve.
3. Our Community
   We believe the wisdom of neighborhood residents is essential to long-term success. Therefore, we are committed to seeking solutions informed by priorities identified in collaboration with the people who live and work in the District, ensuring their voice informs current and future strategies and efforts.
4. Sustainability and Shared Prosperity
   We are working not for short-term wins, but for enduring change. We aim to build systems and strategies that create lasting, generational wealth and well-being for the community.
5. Mutual Support and Shared Responsibility
   We believe that collaboration expands what's possible. By working together, we unlock greater resources, achieve stronger results, and deepen our collective impact. Rooted in a spirit of abundance, we commit to supporting one another and taking shared responsibility—not only for the success of the District, but for each other's success as mission-driven organizations.
6. Place-Based Commitment
   Our organizations are deeply rooted in—and accountable to—the Near Eastside, Martindale-Brightwood, and Southeast/Twin Aire neighborhoods. We are committed to place-based development that builds on the unique assets, histories, and aspirations of each community. We believe that lasting change happens when solutions are locally driven, culturally grounded, and responsive to the lived experience of our neighbors.

Section 2: Neighborhood Center Alliance

Whereas the IEMD is an initiative arising from the planning grant application submitted by the John Boner Neighborhood Centers, Edna Martin Christian Center, and Southeast Community Services, the IEMD shall maintain a Neighborhood Center Alliance composed of the directors of these three organizations and designated members of IEMD permanent staff. The purpose of this Alliance shall pertain to advancing the mission, vision, and goals of the District in accordance with agreed-upon shared values. The Alliance shall serve as a permanent standing Committee with an advisory role towards, but not authority over, the Partner Consortium. To foster increased collaboration, cross-membership on Alliance members' boards of directors shall be encouraged. The Alliance shall meet at a frequency of its choosing, and decisions of the Alliance shall be made by unanimous consent of its members.

Section 3: Theory of Action

The IEMD theory of action is a shift in thinking, planning and implementation of economic, housing, and social supports to improve opportunities for individuals and families residing in the IEMD. Based upon the results of consistent, data-driven evaluation and assessments and community engagement, strategies in the IEMD will guide residents along a pathway of economic mobility. Results-driven, evidence-based strategies will center on seven core components:

1. Asset Building;
2. Entrepreneurship and Business Enterprises;
3. Workforce Development;
4. Social Enterprise;
5. Housing Innovations;
6. Resident Engagement, and;
7. Lifelong Education.

Through engagement in IEMD strategies, residents of the IEMD will work together to promote changes in systems and neighborhood dynamics to support these pathways out of poverty.

Section 4: Mutual Commitments

1. The Agreement is effective beginning January 1st, 2026 and shall end on December 31st, 2035. This Agreement shall be automatically renewed for two consecutive five-year periods unless written notice is provided by one of the participating Neighborhood Centers or jointly agreed by the members of the Neighborhood Center Alliance, ninety days prior to the end of the original or renewal term(s).
2. Neighborhood Center Alliance members agree to support efforts to improve outcomes for individuals, families and the community, and to help ensure that data describing results is analyzed on an ongoing basis. All IEMD Partners agree to adjust their efforts to align with the results of the analysis.
3. Neighborhood Center Alliance members agree to build a wide array of strategies that are composed of evidence-based and results-driven practices.
4. Neighborhood Center Alliance members agree to share all data necessary to inform the work of data and evaluation Partners, who will develop agreed-upon indicators for the

IEMD and measure the impact of the IEMD. Separate data sharing and licensing agreements may be executed with each member, as appropriate, and may be modified as necessary.

5. Neighborhood Center Alliance members agree to break down silos and to move beyond partnership and collaboration towards integration of efforts, data, staffing, and programs as appropriate or required to successfully implement the selected strategies.
6. Neighborhood Center Alliance members agree to abide by such financial agreements as may be deemed necessary by, and are agreed upon by, all Neighborhood Center Alliance members.

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Signature Page

John Boner Neighborhood Centers:

James Taylor
Title: CEO Date: 9/19/25

Edna Martin Christian Center:

Barato Britt
Title: President/CEO Date:

Southeast Community Services:

Peggy Frame

Peggy Frame
Title: Executive Director Date: 9/19/25

Memorandum of Understanding ("MOU") Between The John H. Boner Community Center, Inc. (dba "John Boner Neighborhood Centers" and "JBNC") and Members of the Partnership Consortium for the Implementation of the IndyEast Economic Mobility District

This Memorandum of Understanding ("MOU" or "Agreement") formalizes a multi-organization Partnership Consortium to collaborate in the implementation of the IndyEast Economic Mobility District ("IEMD").

WHEREAS, the federal government made a ten-year designation of the IndyEast Promise Zone, which is designed to improve education, increase the availability of affordable housing, create jobs, promote economic development and improve public safety;

WHEREAS, the federal government made a five-year designation of the IndyEast Promise Neighborhood, which is a place-based U.S. Department of Education program striving to turn poverty-concentrated neighborhoods into communities of opportunity;

WHEREAS, the State of Indiana and the U.S. Department of the Treasury made a designation of certain tracts as Opportunity Zones, which are designed to offer federal tax breaks to those who invest in projects located in the designated tracts;

WHEREAS, the State of Indiana made a designation of the IndyEast Promise Zone as a 21st Century Talent Region, which is designed to attract, develop and connect talent by implementing a plan to increase educational attainment and raise household income;

WHEREAS, the named implementation partners of the IEMD have studied and determined that innovative systemic and structural changes are necessary to address the economic stability, recovery, and mobility of residents within and surrounding the combined IndyEast Promise Zone and Opportunity Zone geographies;

WHEREAS, decreased unemployment and increased household income for unemployed or underemployed neighborhood residents is one of the main goals of the IndyEast Promise Zone designation;

WHEREAS, there are currently and are anticipated to be future funding applications which will provide resources to support the IEMD; and,

WHEREAS, the list of partners in Section 5 have formed a CONSORTIUM to implement the IEMD;

NOW THEREFORE, the CONSORTIUM partners agree and affirm the following commitments, obligations, assurances and responsibilities as defined in the Agreement. By affixing their signature on this Agreement, the IEMD partners ensure the following stipulations shall govern this program and all of its parts until this MOU expires or is terminated.

Section 1: Vision of the IndyEast Economic Mobility District
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.

Section 2: Theory of Change
The IEMD was created to ensure every Eastside neighbor has the opportunity to build wealth that stays local and lasts for generations. Our work aims to stabilize and strengthen neighborhoods, and to bring investment and employment back to long-neglected corridors. Together, we're aligning resources, reimagining vacant properties, and advancing strategies that remove barriers and expand opportunities. Our place-based approach is grounded in decades of collaboration and guided by the voices of our neighbors, reflecting a proven track record of success in making our District a great place to live, work, and learn. The IEMD is creating a foundation for lasting, shared prosperity – built by and for the people who live here.

Section 3: Theory of Action
The IEMD theory of action is a shift in thinking, planning and implementation of economic, housing, and social supports to improve opportunities for individuals and families residing in the IEMD. Based upon the results of consistent, data-driven evaluation and assessments and community engagement, strategies in the IEMD will guide residents along a pathway of economic mobility. Results-driven, evidence-based strategies will center on seven core components:

1. Asset Building;
2. Entrepreneurship and Business Enterprises;
3. Workforce Development;
4. Social Enterprise;
5. Housing Innovations;
6. Resident Engagement, and;
7. Lifelong Education.

Through engagement in IEMD strategies, residents of the IEMD will work together to promote changes in systems and neighborhood dynamics to support these pathways out of poverty.

Section 4: Definition of the Target Area
The footprint of the IEMD target area resides within the Eastside and Southeast side communities of Indianapolis and includes the areas commonly known as Martindale-Brightwood, the Near Eastside, Fountain Square, Twin Aire, and parts of the Near Southeast side. This ~15.8 square mile area is the home of approximately 60,327 residents (as of the 2023 U.S. Census Bureau ACS 5-Year Estimates) and follows the following boundaries: I-65/70 and the Monon Trail to the west, Raymond Street to the south, Emerson Avenue to the east, and 30th Street to the north – inclusive of parcels along both sides of each boundary street and avenue. The target area encompasses the total area of the IndyEast Promise Zone, superimposed Opportunity Zones, and surrounding neighborhoods.

Section 5: Partners
A broad Consortium of partners has been selected to ensure that strategies may be successfully implemented across a broad geography:

a. *Neighborhood Center Partners*: John Boner Neighborhood Centers, Edna Martin Christian Center, Southeast Community Services
b. *Community Development Partners*: Edna Martin Christian Center – Community-Based Development Organization Subsidiary, Englewood Community Development Corporation, Near East Area Renewal,

Southeast Neighborhood Development, Martindale Brightwood Community Development Corporation, Shepherd Community Center, Habitat for Humanity of Greater Indianapolis, Home Repairs for Good

- **c.** *Data and Evaluation Partners*: CityStrategies, LLC; United Way of Central Indiana
- **d.** *Systems Partners*: Intend Indiana, EmployIndy, Indianapolis Neighborhood Housing Partnership, Indy Economic Development, Local Initiatives Support Corporation Indianapolis, Prosperity Indiana, United Way of Central Indiana
- **e.** *Local Government Partners*: The City of Indianapolis

Section 6: Governance

- **a. Partner Consortium:** The Partner Consortium shall be composed of representatives of each of the IEMD partners. The Consortium shall hold meetings at least semiannually in which members provide guidance, support, and strategic direction pertaining to programs and initiatives, their implementation, and other matters necessary and proper for the functioning of the IEMD. In addition, the Partner Consortium shall ensure that relevant data is collected and that systems are being built and utilized.
- **b. Neighborhood Center Alliance:** Whereas the IEMD is an initiative arising from the planning grant application submitted by the John Boner Neighborhood Centers, Edna Martin Christian Center, and Southeast Community Services, the IEMD shall maintain a Neighborhood Center Alliance composed of the directors of these three organizations and designated members of IEMD permanent staff. The purpose of this Alliance shall pertain to advancing the mission, vision, and goals of the District in accordance with agreed-upon shared values. The Alliance shall serve as a permanent standing Committee with an advisory role towards, but not authority over, the Partner Consortium. To foster increased collaboration, cross-membership on Alliance members' boards of directors shall be encouraged. The Alliance shall meet at a frequency of its choosing, and decisions of the Alliance shall be made by unanimous consent of its members.
- **c. Committee Engagement:** The expanded work of the IEMD may occur within Committees, each of which shall have discretion to create subgroups for specific initiatives, strategies, or activities as determined by the Committees. Committees and subcommittees shall meet at a frequency of their choosing. Members of the Partner Consortium may form and dissolve Committees on an ad hoc basis.
- **d. Resident Engagement:** Core to the establishment of the IEMD are the principles of community organizing, resident engagement, and asset-based community development principles. The strategies comprising the IEMD were developed from a variety of community planning processes conducted throughout the District. The following are the key plans that form the basis of the District and the proposed strategies being employed:
    - i. East Washington Street Vision Plan;
    - ii. Sherman Park Redevelopment Plan;
    - iii. Twin Aire Comprehensive Redevelopment Plan;
    - iv. City of Indianapolis-designated Eastside Redevelopment Area (RDA);
    - v. City of Indianapolis-designated Greater Martindale-Brightwood RDA;
    - vi. City of Indianapolis-designated Norwood RDA;
    - vii. IndyEast Promise Neighborhood Strategic Framework; and,
    - viii. Quality of Life Plans for Martindale-Brightwood, Southeast, and Near Eastside.

Section 7: Mutual Commitments

- **a.** The Agreement is effective beginning January 1st, 2026 and shall end on December 31st, 2035. This Agreement shall be automatically renewed for two consecutive five-year periods unless written notice is provided by one of the participating Partners or jointly agreed by the members of the Partner Consortium, ninety days prior to the end of the original or renewal term(s). This Agreement supersedes the MOU for the "Eastside Economic Recovery & Mobility District" signed in 2020.

b. IEMD Partners agree to support efforts to improve outcomes for individuals, families and the community, and to help ensure that data describing results is analyzed on an ongoing basis. All IEMD Partners agree to adjust their efforts to align with the results of the analysis.

c. IEMD Partners agree to build a wide array of strategies that are composed of evidence-based and results-driven practices.

d. IEMD Partners agree to share all data necessary to inform the work of data and evaluation Partners, who will develop agreed-upon indicators for the IEMD and measure the impact of the IEMD. Separate data sharing and licensing agreements may be executed with each Partner, as appropriate, and may be modified as necessary.

e. IEMD Partners agree to break down silos and to move beyond partnership and collaboration towards integration of efforts, data, staffing, and programs as appropriate or required to successfully implement the selected strategies.

f. IEMD Partners agree to work with public and private organizations and individuals to build a community of support, to achieve the stated goals of the IEMD, and to leverage and sustain resources over time.

g. IEMD Partners agree to comply with financial agreements that may be approved by the Consortium and executed separately by the applicable parties.

As stated in the above Agreement, partner organizations are affirming their commitment and obligations to the IndyEast Economic Mobility District by affixing their signature to this Memorandum of Understanding.

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IEMD Partnership Consortium
Signature Page

John Boner Neighborhood Centers:

____

James Taylor
Title: CEO
Date:

Near East Area Renewal:

____

Emily Scott
Title: Executive Director
Date:

Edna Martin Christian Center:

____

Barato Britt
Title: President/CEO
Date:

Southeast Neighborhood Development:

____

Kelli Mirgeaux
Title: President
Date:

Southeast Community Services:

____

Peggy Frame
Title: Executive Director
Date:

Martindale Brightwood CDC:

____

DeAnna Woodruff
Title: Executive Director
Date:

EMCC CBDO subsidiary:

____

Immanuel Ivey
Title: Executive Director
Date:

Shepherd Community Center:

____

Jay Height
Title: Executive Director
Date:

Englewood CDC:

____

Joe Bowling
Title: Executive Director
Date:

Habitat for Humanity of Greater Indianapolis:

____

Jim Morris
Title: President & CEO
Date:

Home Repairs for Good:

Rachel Nelson
Title: Executive Director
Date:

Indy Economic Development:

Jim Schellinger
Title: President/CEO
Date:

CityStrategies, LLC:

John Marron
Title: Principal
Date:

LISC Indianapolis:

Brandon Taylor
Title: Executive Director
Date:

United Way of Central Indiana:

Fred Payne
Title: President/CEO
Date:

City of Indianapolis, Department of Metropolitan Development:

Megan Vukusich
Title: Director
Date:

EmployIndy:

Ken Clark
Title: President/CEO
Date:

Indianapolis Neighborhood Housing Partnership:

Gina Miller
Title: President/CEO
Date:

ADDENDUMS TO THE MEMORANDUM OF UNDERSTANDING ("MOU") BETWEEN THE JOHN H. BONER COMMUNITY CENTER, INC. (DBA "JOHN BONER NEIGHBORHOOD CENTERS" AND "JBNC") AND MEMBERS OF THE PARTNERSHIP CONSORTIUM FOR THE IMPLEMENTATION OF THE INDYEAST ECONOMIC MOBILITY DISTRICT

Purpose and Structure

This section contains **Implementation Partner Addendums** to the IndyEast Economic Mobility District (IEMD) Partnership Memorandum of Understanding (MOU). Each addendum is intended to be executed alongside the existing Partnership Consortium MOU and applies only to partners serving in a funded implementation role. These addendums clarify additional roles, responsibilities, fiscal expectations, and accountability between John Boner Neighborhood Centers (JBNC) and each named Implementation Partner.

Each addendum is structured to:

- Build directly on the existing Partnership Consortium MOU
- Reflect the specific implementation roles described in the IEMD Proposal
- Clearly distinguish program administration responsibilities from general consortium participation

ADDENDUM A: INDIANAPOLIS NEIGHBORHOOD HOUSING PARTNERSHIP (INHP)

Role in the IEMD

INHP shall serve as an **Implementation Partner** for the **IndyEast Homeownership Initiative**, primarily administration of New Markets Tax Credit (NMTC)-supported homeownership development.

INHP Responsibilities

INHP agrees to:

1. Serve as lead agency for NMTC deployment associated with the IndyEast Homeownership Initiative.
2. Manage NMTC compliance, reporting, and transaction structuring.
3. Own properties during development and partner with IEMD community-based organizations acting as developers and other roles.
4. Coordinate with JBNC and District partners to identify eligible sites and development opportunities within the IEMD geography.
5. Work collaboratively with IEMD partners to determine the reinvestment or reuse of home sale proceeds in alignment with District goals.
6. Provide regular updates on units produced, affordability outcomes, and buyer characteristics.

JBNC Responsibilities

JBNC agrees to:

1. Provide District-level coordination and strategic alignment for the Homeownership Initiative.
2. Facilitate collaboration between INHP and IEMD CDC partners.
3. Integrate program outcomes into District reporting, evaluation, and governance processes.

Fiscal and Compliance Terms

- A separate NMTC and fiscal agreement shall govern financial structure, compliance obligations, and reporting requirements.
- INHP shall ensure compliance with all NMTC requirements, and support federal and philanthropic compliance consistent with its role.

SIGNATURES

INDIANAPOLIS NEIGHBORHOOD HOUSING PARTNERSHIP	JOHN BONER NEIGHBORHOOD CENTERS
By: ___________________________	By: ___________________________
Name: _________________________	Name: _________________________
Title: __________________________	Title: __________________________
Date: __________________________	Date: __________________________

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ADDENDUM B: EMPLOYINDY

Role in the IEMD

EmployIndy shall serve as an **Implementation Partner** responsible for employer engagement, fiscal administration, and data tracking related to workforce and employer-facing initiatives, including the **Employer Champions Program** and the **Incentives for Jobs Program**.

EmployIndy Responsibilities

EmployIndy agrees to:

1. Lead employer engagement activities related to the Employer Champions Program.
2. Utilize its Customer Relationship Management (CRM) system to track employer participation, hiring activity, and progression through engagement stages.
3. Serve as fiscal agent for the Incentives for Jobs Program, including processing wage reimbursement requests and disbursing funds.
4. Coordinate with JBNC and IEMD workforce partners to align employer engagement with neighborhood-based workforce pipelines.
5. Provide regular data reports related to employer participation, placements, retention, and reimbursements.

JBNC Responsibilities

JBNC agrees to:

1. Serve as District lead for workforce strategy alignment and coordination.
2. Collaborate with EmployIndy to align employer engagement with IEMD priorities and geography.
3. Integrate workforce outcomes into District-wide reporting and evaluation efforts.

Fiscal and Compliance Terms

- EmployIndy shall comply with all applicable workforce funding requirements and reporting standards.
- A separate fiscal agreement shall govern reimbursement processes and documentation requirements.

[SIGNATURES ON THE FOLLOWING PAGE]

SIGNATURES

EMPLOYINDY	JOHN BONER NEIGHBORHOOD CENTERS
By: ______________________________	By: ______________________________
Name: ____________________________	Name: ____________________________
Title: _____________________________	Title: _____________________________
Date: _____________________________	Date: _____________________________

General Terms Applicable to All Addendums

1. These addendums are supplemental to, and governed by, the IEMD Partnership Consortium MOU.
2. In the event of conflict, the Partnership Consortium MOU shall control unless otherwise specified.
3. All implementation partners remain members of the IEMD Partner Consortium.
4. Each addendum becomes effective upon execution by both parties and remains in effect for the duration of the applicable funding period unless amended or terminated in writing.

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