

# John Boner Neighborhood Centers Database of Record (DoR)

## 1. Introduction

John Boner Neighborhood Centers (JBNC) is seeking proposals for the selection and implementation of a **Database of Record (DoR)** solution that will serve as the organization's primary system for managing data across programs, departments, and partners.

JBNC is a complex, place-based nonprofit organization delivering housing, education, workforce, health, financial, and community-based services to thousands of individuals and families each year. The organization currently relies on a combination of case management systems, housing platforms, education data systems, spreadsheets, forms, and state/federal portals to operate and report on its work. While these tools support essential functions, they also require extensive manual data entry, reconciliation, and workarounds.

## 2. Purpose and Goals

The Database of Record is intended to function as a coordination, visibility, and reporting layer across JBNC's technology ecosystem, rather than as a replacement for all existing systems. The solution must coexist with externally governed and internally managed platforms and support integration, reporting, and workflow coordination across these systems.

The purpose of this RFP is to select a vendor that can provide and support a Database of Record that:

- Serves as the **primary system of record** for individuals, households, programs, partners, and outcomes
- Unifies data currently spread across multiple systems and spreadsheets
- Reduces duplicative and manual data entry
- Supports case management, relationship management, program management, grant management (as a grantee and grantor), donor management, and outcome reporting
- Streamlines communications and engagement with staff, clients, partners, and neighbors
- Is **user-friendly** for both internal staff and external users where appropriate
- Is flexible and configurable to support future growth, program evolution, and new initiatives

JBNC is **not** seeking to simply replicate its current systems in a new platform. Vendors are encouraged to propose solutions that modernize, simplify, and rationalize JBNC's technology landscape while respecting mission-critical and externally mandated systems.

## 3. Organizational Context

The John Boner Neighborhood Centers (JBNC) is a community-rooted nonprofit organization serving Indianapolis' Near Eastside with a mission to inspire neighbors and partners to improve quality of life by providing tools for change and growth. JBNC delivers a comprehensive set of interconnected programs designed to strengthen families, expand economic mobility, and build a thriving, inclusive neighborhood. JBNC's place-based approach ensures that residents have access to the supports, opportunities, and resources they need at every stage of life.

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Across its program areas, JBNC serves as both a direct service provider and a coordinating hub—leading large-scale community initiatives, operating affordable housing, and partnering closely with schools, local organizations, and residents to align services and accelerate impact. This integrated model allows JBNC to respond holistically to community needs while advancing long-term neighborhood stability and growth.

JBNC operates across multiple functional areas, including but not limited to:

- Housing and Facilities Management
- Community-Based Services and Case Management
- Education and School-Based Programming
- Workforce, Career, and Financial Programs
- Health and Wellness (Fitness Zone)
- Youth and Afterschool Programming
- Energy Assistance and Tax Preparation
- Transportation Services
- Economic Mobility and Partner Initiatives
- Community Development
- Grant Management - Both as a Grantee and Grantor
- Data, Finance, Accounting, and Human Resources

JBNC's work involves complex compliance requirements tied to local, state, and federal funders; high-volume seasonal programs; and partnerships with schools, agencies, and community organizations. The DoR solution must operate effectively in this environment.

Today, JBNC utilizes Efforts to Outcomes (ETO) by Social Solutions (also known as Bonterra Case Management) as its primary case-management software system; however, creating a complete view of an individual or family requires importing and reconciling data from multiple external sources. That database alone includes over 77,000 unduplicated clients, spanning over 20 years.

**For reference, in 2025, approximately 150,000 touchpoints were entered in ETO for approximately 16,000 unique individuals.**

Additional organizational background, program summaries, and operational details are provided in the RFP addendums.

## 4. Current Technology Environment and Scope

JBNC currently uses a wide range of software tools across departments, including systems for:

- Case management and participant tracking
- Housing and property management
- Education data and student outcomes
- Financial management and accounting
- Human resources and payroll
- Forms, surveys, and event registration
- Reporting and dashboards
- State and federal program administration

## Request for Proposals (RFP)

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A detailed list of current systems is provided in **Addendum B: Current Systems and Technology Landscape**.

This list is provided **for context only**. JBNC expects that the selected DoR solution may replace, consolidate, or reduce reliance on certain tools currently in use, while integrating with externally required or strategically retained tools. Vendors are encouraged to propose a **future-state architecture** that improves efficiency, data quality, and usability.

At this time, several tools and systems within the JBNC ecosystem are non-replaceable and not tied to specific funders or to local/state/federal program administration. They encompass comprehensive program delivery for their specific program and are self-contained within the delivery. These tools all have open APIs and must seamlessly integrate with the proposed DoR solution. Tools/systems include:

- **Real Page** (Housing and Facilities Management Software and Portal)
- **Wellness Living** (Gym and Membership Software for the Fitness Zone)
- **Waypoint: Transportation Tracking System** (Real-Time Transportation/Route tracking tool for youth and seniors)
- **TBD: Summer Camp / After-School Management System** (Youth programming software that tracks attendance, payments, lesson plans, etc.)

## 5. Scope of Work

The selected vendor will be expected to provide services that may include:

- **Discovery and requirements validation**
  - Data model design
- **System configuration and implementation**
  - Workflow and business process configuration
  - Reporting and dashboard development
- **Data migration and/or integration**
- **Ongoing support and system optimization**
  - User training and documentation
  - Change management and adoption support

JBNC anticipates a **phased implementation approach**, recognizing the need to maintain operational continuity during the transition.

## 6. Functional Requirements

In addition to **program and case management capabilities**, the DoR must support **initiative management, grant management, sub-grantee management and oversight, partner/vendor management, and donor tracking** in a manner that is integrated with participant- and program-level data, while remaining distinct from financial accounting systems and other required systems.

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The following requirements describe the **minimum functional expectations** for the Database of Record. JBNC recognizes that vendors may meet these requirements through configuration rather than customization and encourages clear explanations of how capabilities are delivered.

## 6.1 Core Data Management

The DoR solution must:

- Maintain a **single, authoritative record** for individuals and households
- Support configurable relationships between:
  - Individuals
  - Households
  - Programs and services
  - Events and attendance
  - Partner organizations
  - Vendors
  - Funders
- Outcomes and KPIs
- Allow configurable data fields, forms, and objects **without custom code**
- Support longitudinal tracking across time, programs, and funding periods
- Support external identifiers (e.g., state system IDs, student IDs, utility account numbers).
- Adhere to strict data protection standards and enforce robust role-based access controls to ensure appropriate data visibility and security. Protection of personally identifiable information (PII) is mandatory and must meet industry best practices.
- Support participant data rights in accordance with the Indiana Consumer Data Protection Act (ICDPA), including the ability for participants to request access to the data collected about them and to exercise opt-out and deletion rights. The system must include configurable workflows for processing data access requests, managing deletion requests, and documenting compliance actions.
- Support secure integration with externally governed data sources, including—but not limited to—education systems (e.g., IPS), immunization records where applicable, state-administered systems, and other partner-controlled datasets.
- Demonstrate the ability to securely receive, store, process, and protect externally sourced PII, including education- and health-related data, in compliance with FERPA, HIPAA (where applicable), and other applicable regulatory or contractual data-sharing requirements.

## 6.2 Case Management

The system must support:

- Case assignment and real-time caseload visibility for staff, supervisors, and managers
- Tracking of touchpoints, services, referrals, and follow-ups
- Both short-term, time-bound cases and long-term engagement models
- Compliance-driven workflows with required fields, milestones, and validation
- Case notes, document uploads, and required acknowledgements
- Automatic or self-scheduled notifications, tasks, or flags for follow-ups and next steps within the case management structure

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- Quality assurance tools (e.g., missing data flags, incomplete demographics, audit views)
- Proactive quality assurance tools that allow supervisors to monitor data completeness, workflow compliance, and caseload health in real time
- Comprehensive audit trail functionality tracking staff activity, record edits, and workflow changes
- Supervisor-level scheduling and workload visibility tools

## 6.3 Program and Event Management

The system must support:

- Program enrollment and eligibility determination
- Consent and document collection tied to individuals and households
- Attendance tracking, including:
  - Daily check-in/check-out
  - Threshold-based eligibility (e.g., minimum days attended)
  - Capacity limits and waitlists
- Clear distinction between enrolled programs and open/public events
- Scheduling, rosters, and staff assignments, where applicable

## 6.4 Participant and External Data Submission

The DoR must support secure, low-friction data submission methods that do not rely on persistent usernames or passwords for participants or external partners.

Acceptable approaches may include SMS-based authentication, one-time access links, or backend record lookup based on defined criteria. Submitted data must be capable of creating or updating records directly within the system, with appropriate audit trails and staff review controls.

## 6.5 Relationship Management

The system must support tracking of:

- Partner organizations, agencies, schools, and vendors
- Key contacts, roles, and communication history
- Engagement activities, events, and collaborations
- High-level funding or contractual relationships (non-financial detail)

## 6.6 Communication Management

The system must support integrated communications between JBNC staff, partners, neighbors, donors, and clients:

- Integration with email marketing tools for automatic list-building
- Easily tracking communications via personal emails within the system to track relationships and communications
- Integration with text/sms platform to send updates/reminders and other relationship-building communications

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The system must support outbound and inbound communications via email and SMS, with visibility into communication history across programs and departments. The DoR must support coordination of outreach to avoid duplicative communications and manage communication frequency.

## 6.7 Donation Management

The system must support tracking of:

- Donor records and relationships
- Donation history
- Attribution of donations to initiatives or campaigns
- High-level reporting for development and leadership
- Donor tracking should be integrated at a summary level and designed to coexist with existing finance systems.

## 6.8 Grants Management (JBNC as a Grantee)

The DoR must support JBNC's internal grant management needs, including:

- Tracking grant applications, awards, and periods of performance
- Associating grants with programs, initiatives, and outcomes
- Tracking grant-specific KPIs and reporting requirements
- Supporting one-to-many relationships (one grant funding multiple programs or partners)
- Producing funder-ready reports tied to participant and program data
- This functionality is intended to complement—not replace—financial accounting systems.
- The system must support automated internal notifications for grant reporting deadlines, compliance submissions, and milestone tracking, including notifications to both program and compliance staff.

## 6.9 Grantor Management (JBNC as a Grantor)

JBNC will work with grantee organizations to implement portions of IndyEast Promise Neighborhood (IEPN) and IndyEast Economic Mobility District (IEMD). The DoR must support:

- Grantee organization records and contacts
- Grant review and award process
- Assignment of required outcomes and metrics to grantees
- Tracking progress toward targets for the duration of the grant/award
- Submission and review of supporting documentation
- Rolling grantee data into district-level reporting
- The system should support role-based access for sub-grantees, limiting visibility to relevant data.
- Automated notification workflows to support the full grant lifecycle, including:
  - External notifications to potential and current grantees (e.g., application receipt confirmations, deadline reminders, award notifications, reporting due dates, deficiency notices)

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- Internal notifications to JBNC staff for review milestones, approval steps, compliance tracking, and follow-up requirements
- Escalation or reminder logic when submissions, documentation, or reports are incomplete or overdue

## 6.10 Vendor Management

JBNC works with a variety of vendors and partners to deliver programs, services, and run the organization. The DoR must support:

- Support Vendor organization records and contacts
- Vendor review and eligibility process
  - Where federal funding requires vendor eligibility verification, the system must integrate with SAMS and support documentation workflows aligned with JBNC's Financial Policies regarding vendor compliance requirements.
- Secure online portal for vendors to manage and maintain their information, including file uploads

## 6.11 Reporting, Dashboards, and KPIs

The system must support outcome and activity tracking at both participant and non-participant levels, including aggregate-only, event-based, or partner-reported data where individual-level records are not available or appropriate. This includes:

- Support JBNC's existing KPI and outcomes framework
- Support **initiative-level and place-based outcomes**, including multi-center initiatives such as the IndyEast Promise Neighborhood (IEPN) and IndyEast Economic Mobility District (IEMD)
- The system should support configurable intervention alerts when defined data thresholds or risk indicators are triggered.
- Allow configurable dashboards for:
  - Executive leadership
  - Program and initiative directors
  - Frontline staff
  - Grant and compliance staff
- Reduce reliance on manual spreadsheet manipulation
- Support disaggregation by demographic, program, partner, geography, funding source, and time
- Support evolving KPIs and reporting requirements without reimplementing

Details on KPIs and outcomes are provided in **Addendum C: KPIs and Outcomes Framework** and **Addendum D: IndyEast Promise Neighborhood (IEPN) and IndyEast Economic Mobility District (IEMD)**.

## 6.12 Staff Enablement and Onboarding

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The DoR should support staff onboarding, role-based access, and visibility into required training or certifications where relevant to compliance or service delivery. The system is not expected to function as a full HR or learning management system.

## 7. Technical and Integration Requirements

Existing systems have varying degrees of integration capability and must coexist with the DoR through appropriate API-based, batch, or file-based integration approaches, depending on system constraints. Vendors should describe:

- System architecture and hosting model
- Security, privacy, and role-based access controls
- Integration capabilities (API, batch import/export, file-based)
- Experience integrating with state or federally controlled systems
- Data migration approach and assumptions
- JBNC does not expect the DoR to replace systems such as accounting, payroll, local/state/federal/funder-mandated portals/software or program-specific solutions\*, but requires **clean, reliable integration or coexistence** where applicable.

## 8. Usability and Access

JBNC places a high priority on usability. The proposed solution should deliver a modern, accessible user experience that reduces cognitive load and friction for both staff and participants. Vendors may propose intelligent or conversational interfaces that assist users in completing tasks, submitting information, or navigating workflows, provided these interfaces adhere to accessibility standards and do not require persistent user accounts for participants. The solution must:

- Be intuitive for all users, with varying technical skills
- Support role-based interfaces and permissions
- Offer mobile-friendly or tablet-friendly workflows where appropriate
- Minimize data entry burden and duplicative work
- Online portal that can be used to manage personal information and communication.
- Support limited-access or task-specific users (e.g., front desk, attendance, transportation)

## 9. Implementation, Training, and Change Management

Proposals should address:

- Implementation approach and timeline
  - Implementation must include a structured user acceptance testing (UAT) phase involving frontline staff, supervisors, and leadership prior to final production deployment.
  - Vendors should describe how build-test-iterate cycles are managed.
- Phasing strategy
- Training methods and materials
- Support for organizational change management

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- Ongoing support and enhancement options

## 10. Vendor Qualifications

Vendors should demonstrate:

- Experience with complex nonprofit, public sector, or human services organizations
- Experience supporting regulated and compliance-driven programs
- Experience implementing systems that serve as a primary database of record
- Ability to support long-term partnership and system evolution

## 11. Proposal Submission Requirements

Proposals must include the following sections. Vendors should respond concisely but completely.

### 11.1 Organizational Overview

- Company background and ownership structure
- Relevant experience with comparable organizations
- Financial stability and longevity

### 11.2 Proposed Solution

- Overview of the proposed DoR solution
- Description of how the solution meets JBNC's functional and technical requirements
- Identification of configuration vs. customization
- Vendors should describe what measurable success would look like 12 months after implementation, including operational, adoption, reporting, and data-quality benchmarks.
- Vendors who are invited to the second round of interviews will be asked to provide a representative dashboard example of a family or household "snapshot" dashboard that illustrates how cross-program engagement, key indicators, and intervention triggers would be displayed in the new system.

### 11.3 Current-State to Future-State Mapping

Vendors must include a table or narrative that identifies which existing JBNC tools would be:

- Replaced
- Consolidated
- Integrated
- Retained without integration
- Include rationale, assumptions, and sequencing considerations.

Vendors must include a **visual ecosystem diagram** that illustrates the proposed system architecture, data flow, integration points, automation, and the relationship between the DoR and retained systems.

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## 11.4 Implementation Approach

Vendors must describe their overall implementation approach and timeline, including defined phases, sequencing, and key milestones. Proposals should clearly explain how system readiness will be validated prior to go-live, including structured build–test–iterate cycles and formal organizational readiness checkpoints.

Implementation must include a structured User Acceptance Testing (UAT) phase involving frontline staff, supervisors, and leadership prior to final production deployment. Vendors should describe how feedback is incorporated into the final configuration before launch.

Proposals must also address:

- Phasing strategy and deployment sequencing
- Data migration and validation approach
- Roles and responsibilities (vendor and JBNC)
- Ongoing support, maintenance, and enhancement options

## 11.5 Change Management and Training

Vendors must describe their approach to organizational change management and adoption support. Proposals should outline how change impacts are assessed, how stakeholders are engaged throughout the implementation process, and how transition readiness is evaluated.

Proposals must also address:

- Training methods and materials by user role
- Knowledge transfer and documentation
- Support for adoption and change management
- Support for role-based onboarding
- Strategies to drive adoption and sustained system use

## 11.6 Technical Architecture and Integration

- Hosting and security model
- Integration methods and limitations
- Experience integrating with state or federally controlled systems
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## 11.7 Pricing and Licensing

- Implementation and professional services fees
- Ongoing support costs
- Assumptions and exclusions
- Vendors are asked to separately itemize:
  - API connection costs

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- Integration maintenance costs
- Data storage costs
- Environment costs (sandbox, testing, production)
- Escalation clauses or pricing assumptions
- Overall estimated five-year total cost of ownership model and cost structure

## 11.8 Risks, Assumptions, and Out-of-Scope Items

- Key risks and mitigation strategies
- Explicit assumptions
- Items considered out of scope

## 11.9 References

- At least three references from comparable implementations

## 12. Evaluation Criteria

- Proposals will be evaluated using the following criteria:
- Alignment with JBNC's mission, goals, and operational context
- Ability to function as a true primary database of record
- Functional fit across case management, programs, relationships, and reporting
- Usability for diverse user roles and technical skill levels
- Quality of integration and future-state architecture
- Realism and clarity of implementation and migration approach
- Strength of change management and training plan
- Vendor experience with regulated, complex environments
- Transparency of assumptions and limitations
- Responsiveness and completeness of proposal submission
- Overall cost realism and long-term sustainability

## 13. RFP Timeline

JBNC anticipates the following timeline (subject to change):

- RFP release: March 2, 2026
- Vendor Q&A Webinar: March 16, 2026
- Recording of Vendor Q & A and answers posted: March 20, 2026
- Intent to Apply Due: April 6, 2026
  - Link to Form:  
[https://jbncenters.formstack.com/forms/database\\_of\\_record\\_intent\\_to\\_apply](https://jbncenters.formstack.com/forms/database_of_record_intent_to_apply)
- Proposal Due: April 13, 2026
- Interview #1 Vendors notified: April 20, 2026
- First round of interviews: Week of April 27, 2026
- Second Round of Interviewees Notified: May 6, 2026
- Second round of interviews: Week of May 11, 2026

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- Final Selection: End of May 2026

*Vendors are asked to hold time the week of April 27, 2026 for first round of interviews. Links to upload proposals will be sent to applicants on April 8, 2026.*

## 14. Addendums

The following addendums are included as part of this RFP and provide essential context for respondents:

- **Addendum A:** Organizational Background and Programs
- **Addendum B:** Current Systems and Technology Landscape (contextual; expected to evolve)
- **Addendum C:** KPIs and Outcomes Framework
- **Addendum D:** Departmental Workflows and Operational Context
- **Addendum E:** IndyEast Promise Neighborhood (IEPN) and IndyEast Economic Mobility District (IEMD)
- **Addendum F:** Reporting, Compliance, and Grant Environment
- **Addendum G:** Future-State Vision and Growth Considerations

### Vendor Expectations Regarding Addendums

Vendors are expected to review all addendums and incorporate this context into their proposed solution. Proposals should reflect an understanding of JBNC's operational complexity while avoiding unnecessary replication of current inefficiencies.

JBNC's implementation of this project is not tied to any federal or state resources or their requirements. Vendor and system selection is at the discretion of JBNC leadership.

JBNC appreciates your interest in partnering with us on this important initiative.

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## ADDENDUM A: Organizational Background and Programs

### Overview

John Boner Neighborhood Centers (JBNC) is a place-based nonprofit organization (501c3) serving Indianapolis' Near Eastside.

Each year, JBNC serves thousands of individuals and households through a mix of:

- Ongoing, relationship-based services
- Short-term and crisis-response programs
- Highly regulated state and federal programs
- Community-wide and place-based initiatives

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The organization's structure requires a Database of Record that can support **complex, overlapping engagements** across departments while maintaining a coherent, organization-wide view of people, households, partners, and outcomes.

## Programmatic Scope (Illustrative)

JBNC programs include, but are not limited to:

- **Affordable and supportive housing** - Provides stable, affordable housing across multiple property types, including family and senior housing, while meeting HUD and state compliance requirements and coordinating resident services, certifications, rent collection, maintenance, and reporting.
- **Family navigation and case management** - Supports individuals and families through coordinated navigation, coaching, and case management services, helping them access programs, set goals, and progress toward stability and self-sufficiency across multiple JBNC service areas.
- **School-based services and education initiatives** - Delivers education-aligned services in partnership with schools, including student support, family engagement, attendance and outcome tracking, and coordination with external education systems and funder reporting requirements.
- **Workforce development and career coaching** - Provides career readiness, training coordination, and coaching to support employment pathways, credential attainment, and job placement, often in partnership with external training providers and employers.
- **Financial coaching and asset-building programs** - Supports financial stability through one-on-one coaching and structured asset-building initiatives, helping participants improve financial literacy, reduce barriers, and build long-term economic security.
- **Youth development and afterschool programming** - Offers youth-focused programming, including afterschool and summer initiatives, that support academic success, enrichment, attendance tracking, and youth engagement, often in partnership with schools and community organizations.
- **Energy assistance** - Administers state-regulated energy assistance services, processing high volumes of applications through a state-controlled system while managing internal workflow, quality assurance, customer service, and supplemental reporting.
- **Tax preparation services** - Provides free tax preparation through a federally governed volunteer program (VITA Program administered by Purdue Extension), coordinating volunteers, appointments, and reporting while linking participants to additional JBNC services where appropriate.
- **Health, fitness, and wellness programming** - Delivers health and wellness services through membership-based and programmatic offerings at the Fitness Zone on the Boner Fitness and Learning Center campus.
- **Transportation services** - Supports participant access to programs and services by coordinating transportation assistance, scheduling, and tracking usage to reduce barriers to engagement and participation. This includes transporting youth to and from school and after-school activities, and senior event transportation.

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- **Economic mobility and partner-led initiatives** - Coordinates district- or community-wide economic mobility efforts, working with partner organizations to align programs, track outcomes, manage funding relationships, and report aggregate impact.
- **Community Engagement** - Engages residents, families, and partners through events, outreach, communications, and feedback activities that strengthen community connections and participation.
- **Arts & Culture Programming** - Supports arts-based and cultural initiatives that activate JBNC art spaces, foster creative expression, and engage residents through programming, partnerships, and events.
- **Internal grant management (including outcome tracking, budgets)** - Manages grants awarded to JBNC, including tracking budgets, reporting requirements, timelines, and outcomes across programs and funders.
- **External grantmaking to support programs and initiatives** - Administers grant funds awarded to external partners, including application tracking, award management, reporting, and accountability for outcomes and use of funds.
- **Donation Management** - Tracks donations, donors, and related communications, supporting fundraising activities, financial reporting, and stewardship while coordinating with development and finance functions.

Programs vary significantly in duration, intensity, compliance requirements, and reporting obligations. Many participants engage with **multiple programs simultaneously or sequentially** over time.

## ADDENDUM B: Current Systems and Technology Landscape

This addendum provides an overview of JBNC's current technology environment. The information is intended to:

- Ground vendors in the operational reality of JBNC
- Illustrate the degree of system fragmentation and manual effort
- Provide context for integration and modernization discussions

This list **does not represent the required future-state architecture**. JBNC expects that the selected DoR solution may replace, consolidate, or reduce reliance on some tools listed here, while integrating with others that are externally mandated or strategically retained.

[Click here to view a list of all current systems and tools used by JBNC by use, department, and program alignment.](#)

### Key Observations

- Many systems require **manual data movement** (exports, uploads, spreadsheets)
- Data quality often depends on individual staff workarounds
- Licensing costs and usability constraints limit access for frontline staff

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- Please make sure to reference the System Replaceability Constraint column. This column identifies which systems or tools can be replaced:
    - **System is externally mandated and cannot be replaced:** These systems are managed or owned by partners, city, state, or federally and cannot be replaced
    - **System is JBNC-controlled, but replacement would be high-impact:** These applications fully encompass service delivery for a specific program and are not intended to be replaced. However, they should be integrated with the DoR system to provide visibility into completed work and data for metrics and reporting.
    - **System is JBNC-controlled and replaceable:** These software and tools may be replaced.
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## ADDENDUM C: KPIs and Outcomes Framework and Reporting

JBNC tracks a diverse set of Key Performance Indicators (KPIs) and outcomes across programs, funders, and initiatives.

These metrics support:

- Grant compliance and reporting
- Internal management and accountability
- Strategic planning and community impact assessment
- Track goals vs. actual - monthly, quarterly, yearly

KPIs exist at multiple levels, including:

- Individual and household outcomes
- Program outputs and milestones
- Cross-program and organizational indicators
- Community- and place-based outcomes

### Current State

Many KPIs are currently:

- Compiled manually from multiple systems
- Calculated in spreadsheets
- Dependent on staff interpretation and reconciliation

This limits real-time visibility and increases risk.

### Expectations for the DoR

The Database of Record must support:

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- Configurable KPI definitions
- Automated or semi-automated calculation where possible
- Historical and longitudinal analysis
- Role-based dashboards
- Evolution of metrics over time without reimplementation

[Click here](#) to view a visual representation, broken down by category.

## ADDENDUM D: Departmental Workflows and Operational Context

JBNC operates across departments and initiatives with **distinct workflow patterns, volumes, and compliance obligations**. These workflows vary by **governance model, data availability, service delivery context, and reporting requirements**.

Operational contexts include, but are not limited to:

- **High-volume, seasonal workflows** with strict eligibility and compliance requirements
- **Ongoing housing certification and compliance processes** requiring periodic recertification and audit readiness
- **School- and community-based services** that track both individual participation and aggregate attendance or engagement
- **Volunteer-driven service delivery models** with non-standard schedules, training requirements, and limited system access
- **Transportation services** involving routing, scheduling, and ridership tracking
- **Partner-led and grant-funded initiatives** where outcomes may be reported at an organizational or aggregate level

Across departments, staff operate within a mix of:

- Externally governed systems and workflows that cannot be modified
- Paper-based or manual processes are required for compliance
- Spreadsheet-based tracking used to bridge system gaps
- Duplicate data entry across platforms
- Limited real-time visibility into workload, status, or outcomes

JBNC recognizes that **staff may deliver similar services using different approaches** based on role, context, and professional judgment. While service delivery may vary, **data requirements, accountability standards, and reporting expectations remain consistent**.

The proposed Database of Record must support **multiple concurrent workflow models**, including externally constrained processes, while allowing **multiple ways to complete the same work**. The system must enforce shared data definitions, required fields, auditability, and reporting integrity without forcing artificial standardization.

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Vendors should assume that JBNC will continue to operate across **multiple workflow models simultaneously**, and that the Database of Record must support—rather than eliminate—this operational diversity.

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## ADDENDUM E: IndyEast Promise Neighborhood (IEPN) and IndyEast Economic Mobility District (IEMD)

The IndyEast Economic Mobility District (IEMD) and IndyEast Promise Neighborhoods are **large-scale, multi-center, place-based initiatives** led by JBNC and partners to advance economic mobility and educational outcomes across Indianapolis' Near Eastside. Both initiatives are designed to span **multiple service domains, partners, funding sources, and time horizons**, and to measure both **individual-level progress and district- or place-based outcomes** over time.

At the time of this RFP, elements of both the IEPN and IEMD—including scope, structure, and implementation approach—are **evolving**, and may be phased, adapted, or not implemented in full, or may change over time. However, JBNC requires that the proposed Database of Record be capable of **supporting an initiative of this scale and complexity**, whether for IEPN, IEMD, or future initiatives with similar characteristics.

The Database of Record must support IEMD (or a comparable initiative) as a **distinct yet integrated initiative** within JBNC's broader data ecosystem, without hard-coding assumptions about program structure or delivery model.

### Outcomes & Metrics Framework

IEPN/IEMD outcomes are expected to include a combination of:

- **Individual- and household-level outcomes** (e.g., education, employment, income, asset-building)
- **Programmatic outputs and milestones**
- **Cross-program indicators**  
**District- and place-based measures**, where individual-level data may not always be available

The Database of Record must be able to:

- Support a **robust and evolving outcomes framework**, including the metrics outlined in the first tab of the IEMD Outcomes Workbook, while allowing for future refinement
- Allow metrics to be associated with one or more of the following:
  - Participants or households
  - Programs or activities
  - Centers or locations
  - Partner or sub-grantee organizations

# John Boner Neighborhood Centers Database of Record (DoR)

- Support **longitudinal tracking across years**, cohorts, and funding periods
- Allow for **aggregation and disaggregation** by geography, partner, program, service type, and time period
- Support outcome tracking at both:
  - An **individual level**, where participant-level data exists
  - An **aggregate or proxy level**, where individual data is unavailable or inappropriate

## Initiative, Program, and Partner Management

The Database of Record must support the management of the IEMD and IEPN—or similar initiatives—as a **portfolio of related programs and activities**, rather than a single program or case-management model.

Capabilities must include support for initiatives that involve:

- Multiple programs operating under a **shared outcomes framework**
- Activities delivered directly by JBNC and by **external partners or sub-grantees**
- Programs that **do not follow traditional intake or case management models**
- Multiple entry points, touchpoints, and participation pathways

The system should support:

- **Initiative-level configuration** that does not require duplication of participant or program records
- Mapping programs, activities, and partners to **shared initiative-level outcomes**
- Tracking participation, exposure, or engagement across **multiple entry points**, including events, services, or partner-delivered activities
- Managing **grant-funded initiatives**, including:
  - Outcome tracking aligned to funder requirements
  - Budget- or funding-source association
  - Reporting across partners and sub-grantees

## Flexibility and Future-State Readiness

JBNC emphasizes that the current IEPN and future IEMD are representative of a **class of initiatives**, not a single fixed implementation. Vendors should assume that:

- Initiative design, metrics, and reporting requirements may evolve over time  
New initiatives of similar or greater complexity may be introduced
- Some initiatives may require **lightweight tracking**, while others may require **deep longitudinal analysis**

The proposed Database of Record must therefore demonstrate the ability to **adapt to evolving initiative designs** without requiring significant reconfiguration, redevelopment, or data restructuring.

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# John Boner Neighborhood Centers Database of Record (DoR)

## ADDENDUM F: Reporting, Compliance, and Grant Environment

### Regulatory and Funder Landscape

JBNC operates under numerous reporting and compliance regimes, including:

- HUD and housing-related compliance
- State-administered assistance programs
- Department of Education-funded initiatives
- Workforce and economic development grants
- Private foundation and corporate funders
- Reporting cadences range from daily and monthly to quarterly and annual submissions.

### Current Challenges

- Data required for reports often resides in multiple systems
- Manual reconciliation is common
- Compliance rules vary significantly by program

### Expectations for the DoR

The DoR must:

- Support audit-ready data structures
- Track reporting status and deadlines
- Allow controlled access for compliance staff
- Preserve historical reporting logic where required

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## ADDENDUM G: Future-State Vision and Growth Considerations

JBNC anticipates that future phases of this work may include increased use of automation, intelligent interfaces, or decision-support tools. The proposed architecture should not preclude the adoption of such capabilities over time.

JBNC anticipates continued growth and evolution in:

- Cross-department service integration
- Partner-led and place-based initiatives
- Asset-building and economic mobility programs
- Data-driven decision-making and evaluation

### Future-State Expectations

**Request for Proposals (RFP)**

# **John Boner Neighborhood Centers Database of Record (DoR)**

The DoR should:

- Scale with program growth
- Support new initiatives without structural redesign
- Enable cross-program insights and participant “360-degree” views
- Reduce long-term reliance on spreadsheets and ad hoc tools

JBNC seeks a long-term partner capable of evolving the system alongside the organization.