

Place-Based Technology Implementation Toolkit

For local government agencies and organizations
leading place-based initiatives

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AMERICA

Introduction

From 2022 to 2026, Code for America was honored to partner with local partners in Memphis, Tennessee on a grant-funded project that built on an existing community effort to connect local youth to economic and educational opportunities. The goal was to explore how a digital tool could help government and community-based organizations work together more smoothly, share information, and better support residents. This toolkit distills those lessons into practical guidance for local governments and organizations doing similar work.

About place-based initiatives

A place-based initiative focuses on a specific community or locality (like a neighborhood, city, or region) and brings together local partners (including government agencies, nonprofits, employers, schools, civic groups, advocates, or service providers) to improve outcomes for the people who live there.

Instead of working separately, these groups coordinate their efforts, share resources, and align around local priorities for the community. Some examples of these initiatives include improving access to jobs, making communities safer, helping people find stable housing, supporting small business growth, or advancing neighborhood revitalization.

About using technology to support place-based initiatives

In place-based initiatives where multiple partners are involved, technology can strengthen the connective tissue of the work. When used well, it helps partners stay organized, share information, track progress, and coordinate their work more effectively. A shared system can help local government agencies and community organizations track progress on a project, clarifying responsibilities and keeping everyone moving toward the same goals.

Introducing technology into multi-partner work does carry the risk of complication. Without clear roles, shared expectations, and alignment across partners, even well-designed tools can create confusion or slow progress. When the conditions are right, however, technology can bring structure to complex work, improve visibility across efforts, and support more consistent, connected execution.

Technology tools used in place-based initiatives can take several forms—from simple spreadsheets and shared documents to ready-made platforms or custom-built solutions developed with a vendor. Each option involves tradeoffs in cost, flexibility, and fit. The right choice depends on the available resources for your initiative and how partners plan to work together.

About this toolkit

This toolkit provides guidance for exploring or implementing technology to support coordination across partners in a place-based initiative.

Step 1: Assess	Step 2: Define	Step 3: Manage
Readiness Checklist Assess your group's foundations before committing to adopt technology in support of community-led, place-based initiatives and outcomes.	Roles & Responsibilities Framework Clarify and assign key roles and responsibilities prior to implementation.	Project Management Guide Align stakeholders, manage vendor partnerships, and keep place-based technology initiatives on track and accountable to community-centered outcomes.

This toolkit is designed to be used in sequence. Start with the Readiness Checklist before committing to any technology decisions. Once you're ready to move forward, use the Roles and Responsibilities Framework to establish clear accountability. Then, use the Project Management Guide to stay on track through implementation.

Key Terms

Backbone organization: A central organization that takes on the role of convener: bringing partners together, keeping everyone aligned, and helping coordinate strategy and day-to-day work to achieve shared community outcomes.

Participatory research: Participatory research involves community members not just as subjects, but as active contributors to and leaders of the research process. It includes methods like interviews, focus groups, and co-design sessions.

Partners: Government agencies and community-based organizations (CBOs) providing services to residents.

Shared technology tool: A platform partners use to connect stakeholders, share resources, track outcomes, and strengthen collaboration.

Stakeholders: All interested parties across the initiative.

Vendor: The technology vendor delivering the shared tool.

Step 1: Assess

Readiness Checklist

Before selecting or deploying a shared technology tool, take an honest look at where your initiative stands. Strong technology implementations are built on a foundation of aligned partners, shared goals, and organizational readiness, not the other way around.

This checklist helps backbone organizations assess that foundation. Work through it with your partners, noting your strengths and where gaps exist. Tally your points, and use your results to determine whether you're ready to move forward (and if not, where to focus first).

Alignment and goals

1. Do the core organizations that will be implementing and using the shared technology tool have clear, defined goals and a common vision for improving community outcomes?

☐

Yes — Goals are clearly defined and aligned

The core organizations participating in the initiative have documented shared goals, meet regularly to track progress, and make decisions together based on those goals.

2 points

☐

Somewhat — Goals are similar but not fully aligned

The core organizations generally agree on priorities, but goals have not been formally documented, consistently communicated, or fully aligned across participating organizations.

1 point

☐

No — Goals vary significantly across partners

The core organizations are pursuing different outcomes or priorities, with limited coordination.

0 points



Key takeaway: If goals aren't documented and shared across core organizations, technology will reflect that misalignment.

2. Beyond the core organizations participating in the initiative, have you identified the broader stakeholders connected to the work—including local government and quasi-governmental agencies, community-based organizations, service providers, funders, advocacy groups, and residents directly impacted by the initiative?

☐

Yes — Stakeholders identified

Key stakeholders across sectors and resident groups have been mapped and clearly defined.

2 points

☐

Somewhat — Partially identified

Some stakeholder groups are identified, but gaps remain in representation or clarity across key sectors.

1 point

☐

No — Not yet identified

Stakeholders have not yet been fully mapped.

0 points



Key takeaway: You can't design a shared technology tool without ensuring the right stakeholders (and their needs) are identified to support effective, consistent use.

3. Are the core organizations and broader stakeholder groups actively engaged in collaboration and prepared to use or support a shared technology tool?

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Yes — Regularly engaged

Core organizations and key stakeholder groups participate in shared meetings and joint planning, with a clear, demonstrated commitment to coordinating their efforts in support of the initiative's shared goals.

2 points

☐

Somewhat — Engaged occasionally

Some core organizations and key stakeholder groups are involved, but engagement is inconsistent or limited to certain organizations.

1 point

☐

No — Limited engagement

Core organizations and key stakeholder groups largely operate independently, with little coordination, shared planning, or commitment to a common approach.

0 points



Key takeaway: Building active engagement is a prerequisite before introducing shared technology.

Coordination and systems

4. Have you assessed the coordination challenges among organizations and residents engaged in and/or impacted by the place-based initiative?

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|--|-----------------|
| ☐ Yes — We have a clear picture of where coordination works and where it breaks down
We have identified where information sharing works well and where duplication or gaps in service connectivity exist. | 2 points |
| ☐ Somewhat — We have a general sense but haven't fully mapped it
We know coordination is inconsistent in some areas but haven't done a thorough assessment across all partners. | 1 point |
| ☐ No — We haven't fully assessed this yet
We know organizations are largely working in silos but haven't formally evaluated the impact on residents. | 0 points |

☒ **Key takeaway:** Understanding coordination gaps is essential to ensure shared technology improves alignment rather than reinforcing existing silos.

5. Have you evaluated how stakeholders currently utilize technology in their operations related to the place-based initiative?

- | | |
|---|-----------------|
| ☐ Yes — We have a clear understanding of current tools and processes
We know which partners use shared systems and where manual or informal processes create gaps. | 2 points |
| ☐ Somewhat — We have a partial picture
We have some visibility into how partners use technology, but it varies across organizations. | 1 point |
| ☐ No — We don't yet have a clear picture
We have not fully assessed how partners are currently using technology. | 0 points |

☒ **Key takeaway:** Without a clear picture of existing tools and processes, a new shared system risks duplicating what's already there or disrupting what's already working.

6. Have you assessed partner comfort and readiness to share program, stakeholder, or participant data?

- | | |
|--|-----------------|
| ☐ Yes — We have had direct conversations and safeguards are in place
We have established data sharing agreements and confirmed partners understand and are ready to share data responsibly. | 2 points |
| ☐ Somewhat — We've had initial conversations but need to go deeper
Partners have expressed openness but we still need to develop agreements, protocols, or technical infrastructure. | 1 point |
| ☐ No — This is still an open question for our initiative
We have not yet assessed partner comfort or addressed the legal, organizational, or trust barriers that may exist. | 0 points |

☒ **Key takeaway:** Data sharing readiness is essential for successful collaboration. Without clear agreements, trust, and infrastructure in place, initiatives risk delays, limited functionality, or breakdowns in coordination.

People and leadership

7. Does your initiative have a dedicated backbone lead responsible for overseeing technology implementation and change management?

- | | |
|--|-----------------|
| ☐ Yes — Dedicated backbone lead in place
A clearly designated individual or team is responsible for coordinating implementation, managing change, and supporting adoption of the shared tool across partners. | 2 points |
| ☐ Somewhat — Shared or informal responsibility
Implementation and change management are currently distributed across roles, but no single dedicated lead is in place to coordinate the work end-to-end. | 1 point |
| ☐ No — No designated backbone lead
There is not yet a clear point of accountability for overseeing implementation or change management. | 0 points |

☒ **Key takeaway:** Establishing this central role is recommended before introducing shared technology.

8. Do participating organizations have the on-the-ground staff, time, and operational processes needed to consistently use a shared technology tool in their day-to-day work?

☐

Yes — Capacity confirmed

The staff who will use the tool have sufficient time, training, and operational support to incorporate it into their day-to-day work.

2 points

☐

Limited — Would require training and support

Some organizations have the staff capacity to adopt the tool, while others would require additional training, onboarding, or workflow adjustments.

1 point

☐

No — Capacity is lacking

Staff are already stretched thin, and participating organizations are not currently positioned to consistently adopt or use a new tool.

0 points



Key takeaway: Addressing capacity is necessary before moving forward, and requires a structured onboarding and change management plan to ensure successful adoption.

9. Is there executive-level buy-in across participating organizations to invest the time, resources, and organizational attention needed to support a shared technology tool?

☐

Yes — Strong support

Leaders across participating organizations have committed resources, empowered staff to participate, and actively champion the implementation effort.

2 points

☐

Limited — Some support but not consistent

Some leaders support the initiative, but commitment, resource allocation, or prioritization varies across organizations.

1 point

☐

No — Lack of or unclear support

Leadership has not clearly signaled support, allocated resources, or demonstrated a commitment to the work.

0 points



Key takeaway: Securing executive buy-in is a critical prerequisite to adopting technology.

10. Are partners willing to participate in ongoing coordination—such as shared meetings, data review, and joint planning—to make a shared tool effective over time?



Yes — Strong commitment

Partners have agreed to ongoing coordination structures, with clear expectations for participation and accountability.

2 points



Possibly — Depends on time and resources

Partners are open to participating in ongoing coordination, but expectations around participation and long-term commitment have not yet been clearly established.

1 point



No — Unlikely to participate consistently

Partners are not positioned to sustain ongoing coordination.

0 points



Key takeaway: Initiatives that can't commit to sustained coordination will have a hard time sustaining the shared technology tool.



Assessing your score

Technology alone cannot solve collaboration challenges. If underlying issues such as misaligned goals, limited trust among partners, or gaps in capacity exist, those must be actively addressed alongside any technology implementation. A tool is only as effective as the conditions and relationships that support it.

Tally your final score to find your readiness stage:

Ready to pilot

Strong alignment, capacity, and partner buy-in are in place. You are well-positioned to move forward with technology procurement and deployment. Focus next on selecting the right vendor and establishing your rollout plan.

14 - 20
points

Needs alignment and capacity building

Some foundations are in place, but gaps remain. Before moving forward, prioritize where you answered “Somewhat” or “No.” Consider targeted convenings, capacity-building support, or a planning phase before procurement.

8 - 13
points

Early stage — foundational work needed

Significant groundwork is needed before pursuing a technology solution. Focus on relationship-building, shared goal-setting, and securing leadership buy-in. Technology will be most effective once this foundation is in place.

0 - 7
points

Step 2: Define

Roles & Responsibilities Framework

Successful technology deployments don't happen by chance; they depend on clear roles, shared expectations, and consistent accountability across every partner involved.

This framework outlines the core responsibilities of three key roles in a place-based technology initiative:

Backbone organization

Leads coordination, accountability, and stewardship of the initiative to ensure technology advances shared community goals.

Partner organization

Use the tool in service delivery, contribute community insight, and support ongoing adoption and improvement.

Tech vendor

Provides, supports, and improves the technology to meet local needs and sustain long-term success.

How these responsibilities are distributed will vary depending on your initiative's structure, stage, and available capacity. For example, local government may serve as the backbone organization convening the effort or as a partner delivering services directly to community members. Use this framework before implementation begins to establish clarity, and return to it when roles shift or challenges arise. It serves as a shared reference point to help ensure every partner understands their responsibilities and contributes to the success of the initiative.

Backbone organization role

The backbone organization role—the lead convener responsible for coordinating the initiative—is accountable for ensuring technology is used intentionally and in service of community outcomes. This includes managing relationships across partners, maintaining focus on mutual goals, and ensuring the shared technology tool works for the people using it. Backbone organizations tend to be nonprofits, intermediary organizations, or local government agencies.

Backbone organizations are responsible for:

- **Co-design and implementation:** Partner with service providers and community stakeholders (including residents where appropriate) to design how the tool is used and integrated into existing workflows. The goal is to streamline processes and reduce duplicate data entry, not add to workloads.
- **System integration:** Ensure the technology strengthens existing service delivery systems rather than duplicating them.
- **User feedback and continuous improvement:** Establish regular channels for gathering input from community-based organizations, service providers, and residents to assess usability and real-world fit. Use feedback and usage data to iteratively improve the tool.
- **Fundraising:** Secure and direct funding toward shared systems and tools that support coordination—including ongoing implementation, maintenance, and improvement.
- **Governance and data practices:** Establish clear decision-making structures for how the tool is managed, updated, and scaled. Develop shared data practices that promote transparency, trust, and informed decision-making.
- **Tool stewardship:** Define who oversees the tool on an ongoing basis, including vendor management and performance monitoring.
- **Sustained adoption:** Ensure partners consistently use the tool in day-to-day workflows beyond initial rollout.
- **Accountability for use:** Clarify expectations for how (and how often) people are expected to use the tool, and clearly distinguish responsibilities across all partners.
- **Change management:** Actively support the workflow changes that come with adopting new technology.

Partner organization role

The partner role can be filled by a wide range of organizations, including government agencies, nonprofits, employers, schools, civic groups, and/or community-based organizations who operate on the frontlines of direct service delivery.

There are often multiple partners in a place-based initiative. Because of this, any tool designed to coordinate across an ecosystem of partners depends on their buy-in, participation, and ongoing support. CBOs in particular hold community trust. They are often under-resourced, and their participation should be structured to be as low-lift as possible while remaining meaningful.

Partners should be responsible for:

- **Tool utilization and adoption:** Learn to use the shared tool and integrate it into daily workflows and service delivery, including entering timely data and making referrals through the coordinated platform.
- **Policy and systems alignment:** Flag policies, compliance requirements, or bureaucratic processes that affect how the tool is used or how data can be shared. Identify opportunities to align government systems and resources with the initiative's shared goals.
- **Community voice:** Bring the perspective of the impacted community into the implementation process. CBOs are often best positioned to identify when a new tool isn't leading to improvements for residents.
- **Tool improvements:** Provide ongoing feedback on participant needs, system gaps, and opportunities to improve the tool.

Tech vendor role

A strong place-based tech vendor should act as a true partner, not just a company delivering a product or service. When evaluating vendors, look for evidence of this orientation (not just technical capability) before signing a contract. They should work alongside the backbone organization to understand goals, adapt to community needs, and support success over time.

Tech vendors are responsible for:

- **Tool access:** Provide reliable access to the tool, ensuring it functions effectively for all users and partners.
- **Technical support:** Offer responsive technical support and training, including troubleshooting issues, addressing requests, and equipping partners and providers to use the tool effectively. Response times and escalation procedures should be clearly defined in the vendor contract.
- **Tool improvements:** Continuously improve tool functionality based on place-based insights, local user needs, and data, with an iterative approach to updates and improvements.
- **Sustainability and access:** Work alongside the backbone organization and partners to ensure sustainable access to the tool over time.

Project Management Guide

Strong project management in a place-based technology initiative means more than hitting delivery deadlines—it means keeping the work accountable to community outcomes at every phase. This guide helps backbone organizations monitor progress, manage relationships across partners, and ensure that vendors remain responsive to community needs throughout the engagement.

Monitoring project signals by phase

Each phase of a technology implementation will surface signals about where the work is on or off track. These signals help stakeholders track progress, spot challenges early, and keep the project grounded in community goals at each phase.

Phase 1: Pre-launch (planning, discovery, and tool customization)

This phase involves getting clear about the project intent and using this to inform the right plan and technical functionality. It focuses on understanding the local context, aligning stakeholders, and defining the problem based on real community needs.

If the technology solution supports customization, this would also be the time for the vendor to make updates to the shared technology tool. The goal of this phase is to test assumptions early so that stakeholders can build a solution that also works in practice.



Expected progress

- Backbone organization leads or facilitates discovery with local stakeholders to understand existing workflows, coordination gaps, and community needs before any tool decisions are made
- Backbone organization connects vendor with local stakeholders to collaborate on user journey mapping and process design, helping ensure the tool fits existing workflows and surfacing any needs for additional functionality
- Backbone organization clearly communicates expectations for each partner's contributions, particularly for front line staff who will incorporate the tool into daily workflows
- With input from partners, backbone organization solidifies the project timeline and goals, including success metrics
- Vendor adds customization to the tool and/or builds prioritized functionality that has been informed by and agreed upon by stakeholders



Positive signals

- Project scope reflects community input and project goals align with local priorities
- Partners and local stakeholders are engaged and willing to participate, or feel comfortable raising concerns and working toward solutions collaboratively
- Known limitations and risks that may impact tool implementation success have been identified, and the vendor has determined potential solutions and risk mitigations
- Success metrics are clearly defined, and the vendor has outlined how they will be working to achieve these outcomes
- Initial testing of new tool functionality and/or customizations produce the intended result, and the tool feels simple to integrate into stakeholder workflows



Warning signals

- Project is mostly focused on hitting deadlines, instead of ensuring that it's actually helping people, improving services, or achieving the intended outcomes
- Cross-project stakeholders are not clear about their individual roles in working toward project goals
- Vendor proposes or builds a solution that does not represent a sufficient understanding of the local context and the needs of local stakeholders
- Vendor is inflexible in timeline or approach when faced with local feedback



Key questions to answer

- What assumptions are you making about local workflows?
- What feedback from local stakeholders changed the design of the solution?
- What risks do you anticipate during implementation?
- How are you measuring success for this technology implementation?

Phase 2: Launch (implementation and early use)

The launch phase is when you start using the tool in day-to-day work. The focus is on training people, gathering feedback, and making quick improvements to functionality or process. Using the tool in practice is the best way to understand what works and what doesn't.



Expected progress

- Backbone organization, vendor, and other stakeholders communicate regularly throughout project launch to ensure alignment, discuss potential risks, and plan next steps
- Vendor onboards local stakeholders to the tool gradually, focusing on groups small enough to offer hands-on training and responsive support
- Backbone organization works with CBO partners to communicate timeline and tool usage expectations, and helps vendors navigate blockers (such as CBO bandwidth constraints) as they arise
- Backbone organization and vendor establish methods to track early tool usage, gauge user experience, and surface issues quickly



Positive signals

- Vendors establish feedback loops with frontline users and are responsive in addressing tool issues
- Vendors actively track usage and adoption metrics, regularly sharing this data with the backbone organization and other partners
- Community stakeholders remain engaged in the project, contributing insights and encouraging participation among partners
- Frontline users clearly understand the tool's purpose and how to use it in their day-to-day work



Warning signals

- Frontline users report confusion about the purpose of the tool and how to use it, but support is limited
- Vendor is slow to address tool problems or unable to creatively pivot when faced with blockers
- Frontline users are unwilling to engage with or spend time learning the tool
- Transparency and communication begins to diminish among stakeholders



Key questions to answer

- Are frontline users starting to see a positive impact from adopting the tool?
- Are there groups of frontline users who are struggling to adopt the tool?
- What changes have the vendor made based on critical feedback?
- Do local stakeholders have the capacity and support needed to maintain successful tool adoption?

Phase 3: Post-launch (learning, improvement, and sustainability)

This phase is about improving the tool based on what was learned during launch. This includes examining how it is actually used, what's working, and what needs to change, as well as making sure it can be supported and maintained in the long term.



Expected progress

- Backbone organization, vendor, and partners share their collective outcome data and insights to understand whether the project and tool implementation were successful
- Vendor identifies and shares plans for additional functionality or tool improvements that would further benefit frontline users
- Backbone organization ensures outcomes, learnings, and next steps are communicated with the broader community
- Backbone organization drives conversations around opportunities for improvement and longer term sustainability



Positive signals

- Vendor regularly shares performance and outcome data
- Product improvements reflect community needs
- Local organizations feel confident using the tool and have integrated it into their workflows
- Vendor works with local stakeholders to discuss what long-term sustainability looks like



Warning signals

- Vendor engagement with community declines after launch
- User feedback doesn't result in vendor product updates or changes to approach for training and support
- Local organizations struggle to maintain tool usage
- Tool updates do not relate to project goals or community outcomes



Key questions to answer

- How is the tool improving outcomes for local organizations?
- What improvements are planned based on user feedback?
- What support, ownership, or partnerships are needed to sustain the tool long term?
- If funding or vendor support ended tomorrow, what would happen to the tool?

Tools for managing stakeholder relationships

When many partners are involved in a project, it's easy for the work to lose focus or fall out of sync. Regular check-ins, shared success metrics, and clear feedback channels keep the work on track and grounded in community outcomes.



Regular check-ins

- Schedule regular check-ins between partners and the vendor to maintain alignment, identify challenges early, and ensure the project continues to reflect community needs.
- These meetings should cover:
 - Progress against project milestones
 - Updates on tool implementation and adoption data
 - Feedback from users and community partners
 - Risks or challenges that require attention
 - Planned improvements and next steps



Shared success metrics

- A shared set of success metrics that center community outcomes help to keep stakeholders aligned and moving toward the same goals. Where possible, success metrics should be co-developed with community partners and residents, not defined solely by the backbone organization or vendor.
- Frame these metrics around:
 - User adoption
 - Community outcomes
 - System reliability



Community feedback channels

- Providing CBOs with meaningful opportunities to share feedback helps ensure the technology solution reflects the real needs and experiences of the people it is meant to serve. Ongoing engagement with community members—through participatory research and feedback—keeps the project grounded in lived experience and ensures it remains community-led over time.
- Some options for clear feedback channels are:
 - Identifying and communicating points of contact for reporting challenges or suggestions
 - Meetings with community organizations to gain deeper insight into their experiences using the tool
 - Sending surveys to tool users for general feedback

Mechanisms for course correction

Even with strong planning, projects will run into challenges. New information, changing priorities, and unexpected barriers are a normal part of the work. The goal is not to avoid these moments, but to respond to them quickly so the project stays on track and continues to meet community needs.



Re-align project goals

- Periodically revisiting project goals with stakeholders helps ensure the initiative remains focused on community outcomes.
- This may involve:
 - Understanding how and why goals have shifted
 - Revisiting the original goals of the project and evaluating whether they reflect current community priorities



Adjust timelines or scope

- If challenges make the project's original targets hard to achieve, consider adjusting goals or success metrics. Any changes should be made carefully, with the community's best interests guiding decisions—even if that means prioritizing what works for residents over strictly meeting launch deadlines or testing objectives.
- This may involve:
 - Adjusting the tool rollout plan to start with a smaller group of stakeholders first
 - Working with the technical vendor to prioritize the most impactful product features and evaluate what can be temporarily deprioritized
 - Extending timelines to allow the opportunity for greater tool adoption, and therefore more feedback and data



Conduct additional user research

- If adoption and usage challenges arise during rollout of the shared technical tool, the tool may not be effectively fitting into people's workflows. In these cases, additional user research can surface the root of the issue. This can help uncover adoption challenges, breakdowns in workflow, and improvements that could make the tool more useful.
- This may look like:
 - Conducting additional research with partners who are using the tool
 - Conducting participatory research with those in the community who engage with or are impacted by the tool
 - Re-visiting initial project design with stakeholders, now that there is additional knowledge and feedback

Conclusion

Successful technology implementation in a place-based initiative is not just about selecting the right tool and vendor, but about building the conditions that allow that tool to work in service of the community. This toolkit is designed to support that process: to assess whether those conditions exist, to ensure everyone understands their role, and to keep the work on track and accountable to community outcomes.

Used together, the three components of this toolkit can help local governments and community organizations move from fragmented, siloed efforts toward more coordinated, connected work. Remember that this toolkit is a starting point. Place-based initiatives are long-term by nature, and the technology that supports them should evolve alongside the partnerships, priorities, and community needs. Return to this guidance as your initiative matures and as new challenges arise.

The most effective initiatives approach technology as one part of a broader system—one designed to reduce barriers and make it easier for residents to access opportunities and resources. When implemented with intention, the right technology can help your initiative operate more cohesively and respond more effectively to the communities you serve. That is the goal this toolkit is built around, and what should guide every decision you make along the way.

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About Code for America

Code for America is a nonprofit that uses human-centered technology to make government work better for everyone. It builds digital tools, turns policy into practical systems, and helps make services easier for people to use.