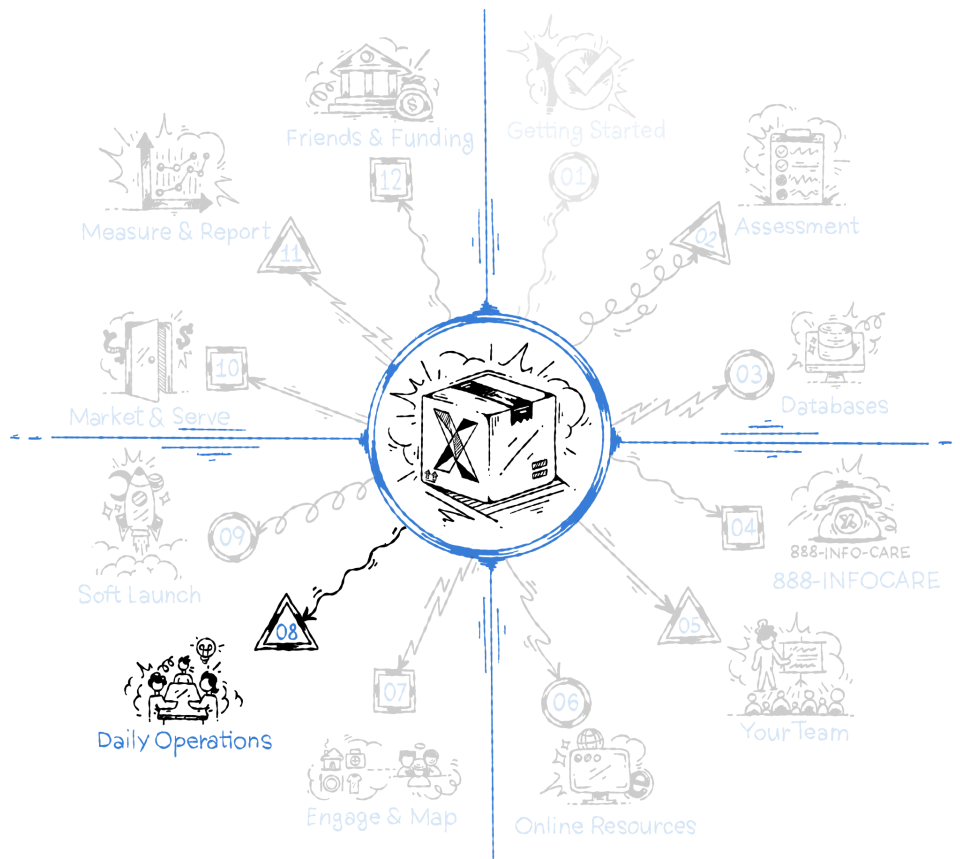


# CityServeX “Box” Manual

(#8 - Daily Operations)

## #8: Daily Operations

Including recording, reviewing, and reporting



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## Daily Operations

8.0 Up to this point, a lot of information has been presented and a lot of your time has been invested in being ready to offer and deliver the service of Resource Coordination to those in need.

Now you're ready to consider what day-to-day operations could look like, understanding that there will be variations based on facilities, current organizational structure, positions added, surrounding demographics, etc.

The following guides assume -

- The **CityServeX** Affiliate operates out of a physical location that the community can walk into.
- The **CityServeX** Affiliate has a phone that can be utilized for incoming and outgoing calls.
- The **CityServeX** Affiliate has access to the appropriate hardware and software technologies needed to serve, document, research, etc.
- The **CityServeX** Affiliate has at least 2 team members in the roles of Care Champion (CC) and Resource Coordinator (RC), but that the other roles of Welcome Agent and Community Advocate are also being fulfilled, even if by the CC and/or the RC.



## Beginning Your Day

### 8.1 Opening Procedures

- Startup computers
- Turn on office lights
- Turn on office music (if using)
- Ensure coffee, tea, water, and cups are stocked (if providing)
- Check emails and respond appropriately
- Check Voicemails
  - Distribute message(s) to appropriate people
  - Return other calls as soon as possible
- Make sure to have all paperwork for the day
  - If something is low, make copies
- Make sure lobby is organized and clean
  - Telephones
  - Desk surfaces
  - Counters
  - Printer buttons and screens
  - Pens and Clipboards (if using)
  - Chair arms at desks and in lobby
  - Light switches and plates

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- o Front doorknobs (exterior and interior)
  - o Any other surfaces that are common touchpoints
- Unlock the front door at 9:30 AM.

## 8.2 Hospitality

Greet everyone entering the premises in a friendly, courteous manner. The person in front of you is worthy of your attention; however, another person entering the premises should be acknowledged, and told politely to wait just a moment.

The person in front of you is the priority. Answering the phone secondary, but when no one else is present, answering the phone is the priority.

Offer all guests a seat, coffee, tea, or water.

**NOTE:** with regard to guests that are **Spanish Speakers**

- Encourage Spanish speakers to speak English. This is loving them well and encouraging them to move to the next level. Try the following phrase:, “For your benefit, we ask that you speak English to the best of your ability. It may help you to practice.”
- In the event they still cannot speak English, accommodate them, and speak Spanish.
- In the event you cannot speak Spanish, please use the Google Translation app.



## Proceed:

*Thank you for visiting. How may we assist/help you?*

The Guest may Need Help with:

- o Any number of things. Let them know someone will be right with them.
- o Contact Resource Coordinator making them aware of Guest.
- o Have Guest that needs assistance fill out a Basic Needs Assessment Form (BNA).
- o When BNA Form is complete, notify Resource Coordinator. RC will either ask for Guest to be escorted to their office, or will come and get Guest from lobby/waiting area.

The Guest may have an Appointment with a team member

- o Contact the team member.
- o Let the guest know the team member has been notified and will be with them in a moment.  
Team member will either ask for Guest to be escorted to their office, or will come and get Guest from lobby/waiting area.

## Closing Procedures

- Return all calls
- Shut down computers
- Turn off office lights
- Turn off office music (if using)
- Lock the front door at 2:00 PM.

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## The Beginnings of Resource Coordination

### 8.1 Begin Resource Coordination

- Intake Process - Create a Welcoming Environment:
  - All Guests needing assistance meet with a Resource Coordinator
  - Greet Guests sincerely and introduce yourself clearly
  - Begin with light conversation to help them feel at ease
  - Show that you respect their time and courage in seeking support
  - Explain your role - to offer Guests the CityServeX Affiliate (Insert Name) services of connecting people with resources they need through the creation of a Personalized Action Plan (PAP) for them and thus making them a Participant.
  - The RC asks if they understand and would like to proceed.
    - If yes, RC explains that while they may have shared their story with multiple people they would like to learn about them and their present circumstance to see how they can help.
    - If no, RC explains that they are welcome to return in the future should they change their mind, but they may want to go to [findhelp.org](http://findhelp.org) and search on their own for resources there.

### Proceed for Guests interested in becoming Participants:

*Please tell me about you and how we may assist/help you?*

- This is the First 15 Minutes of the meeting. Refer to the next few pages for how best invest this time in a person in need.

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## The First 15 minutes

### Purpose

This guide outlines best practices for Resource Coordinators conducting initial meetings with CityServeX Participants. The goal is to create a supportive environment that encourages open communication while gathering essential information. Our mission is to uncomplicate and humanize social system services. This document is intended to provide practical tips on how to humanize in the first 15 minutes.

### Setting the Foundation: The First 15 Minutes with CityServeX Participants

When you first meet with a Participant, remember that they've likely already told their story multiple times to different agencies. Chances are they are in some state of trauma. Your role is to make this experience different - more human, more dignified.

1. Speaking Without Saying a Word
  - Be conscious of your gaze.
  - Your eyes speak before your lips do.
  - Smile. Set a positive tone in the room.
  - Soften your voice before you speak

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6. Be a Loud Listener

- Show you're fully engaged through supportive responses - nods, "mm-hmm," or "I hear you" - like the affirming energy in a Pentecostal church
- Prove to them you hear every word by reflecting and restating back their key points and feelings to demonstrate deep understanding
- Embrace the natural pauses and silences, letting them complete their thoughts without jumping in
- Don't be a topper - that is retell your own similar pain story. That tells them to pay less attention to their inferior set of painful circumstances and more time to my superior painful situations.

7. The Quality of Your Conversations Depends on the Quality of Your Questions

- "What brings you to CityServeX today?"
- "What would be most helpful for you right now?"
- "Could you tell me more about your current situation?"
- "What have you already tried?"

8. Ask 30,000 feet questions

- If this five years is a chapter in your life, what is the chapter about?
- If we met a year from now, what would we be celebrating?
- What would you do if you were not afraid?
- Tell me a time when you felt seen.

9. When trust and credibility are established, ask these probing questions

- What is the "no" or "refusing" you keep postponing?
- What commitments have you made that you no longer believe in?
- What is the gift you currently hold in exile?

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- What talent do you have that you are currently not using?

9. Be Curious, not Critical

- Ask not what they believe but how they come to believe that.
- Ask a story question. Not why you did you go the story late at night, but tell me a story about the last time you went to the store late at night.
- Ask them who is walking beside them in their journey?
- Ask them if they are a person of faith?

10. Summary and Reflect Back a Strength You See in Them

- “You are really good at thinking before you speak.”
- “I admire your courage to face your feelings and not bury them.”
- “Your determination to make a better life for your children is inspiring.”
- “The fact you are here shows you are fighting. Good for you.”

11. Show Understanding Through Action

- Take notes respectfully, explaining why you're writing things down
- Summarize what you've heard to ensure accuracy
- Validate their experiences without judgment
- Acknowledge the challenges they've faced

## After Listening to Participant’s Story:

### Build Trust Through Clarity

- Explain CityServeX's services and process clearly
- Be honest about what you can and cannot provide
- Set realistic expectations about timelines and next steps

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- Share relevant examples of how you've helped others (while maintaining confidentiality)

## End with Clear Next Steps

- Summarize what you've discussed
- Outline specific actions you'll both take, documenting this on a Personal Action Plan (PAP)
- Ask how they prefer to receive their PAP (hard copy, text, or email)
- Provide your contact information through CityServeX
- Schedule follow-up meetings if appropriate
- Ensure they know what to expect next

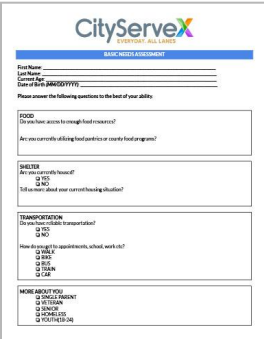
## Important Reminders

- Your role is to help Participants feel seen and supported while gathering information needed to provide effective assistance
- Maintain professional boundaries while showing empathy
- Document all interactions according to CityServeX protocols
- Follow up as promised to maintain trust



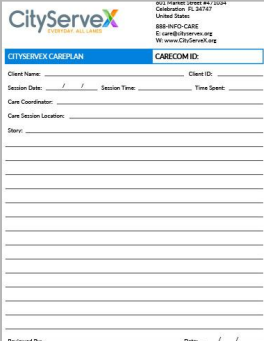
## CityServeX Intake Forms

Click image thumbnails to download each form



The thumbnail shows the 'BASIC NEEDS ASSESSMENT' form. It includes fields for First Name, Last Name, and Date of Birth. Below these are sections for 'FOOD' (Are you able to access enough food resources?), 'SHELTER' (Are you able to afford housing?), and 'TRANSPORTATION' (Do you have access to transportation?). Each section has a 'YES' or 'NO' checkbox and a space for additional comments. At the bottom, there is a 'MORE ABOUT YOU' section with checkboxes for 'ENGLISH SPEAKING', 'SPANISH SPEAKING', and 'OTHER LANGUAGE'.

**Basic Needs Assessment:** A Basic Needs Assessment form collects essential information about an individual's access to food, shelter, and transportation, helping service providers identify gaps in basic necessities and connect clients with appropriate resources for immediate assistance.




The thumbnail shows the 'CITYSERVE CAREPLAN' form. It includes fields for Client Name, Client ID, Session Date, Session Time, and Time Spent. Below these are sections for 'CARE COORDINATOR' and 'CARE SESSION LOCATION'. The form also has a 'REVIEWED BY' field and a 'DATE' field. The main body of the form is a large text area for recording the participant's personal story and circumstances.

**CarePlan:** The CityServeX CarePlan is a client-centered documentation tool that captures essential identifying information including client name, service location, and appointment time, while providing dedicated space to record the participant's personal story and circumstances. This structured form enables care providers to track individual needs, document meaningful client narratives, and develop personalized intervention strategies that honor each participant's unique journey and challenges.






**Care Subcategories:** The CityServeX Care Subcategories provide an exhaustive classification of support services across seven key domains: Basic Needs, Community, Physical Health, Emotional Wellness, Education/Employment, Financial Stability, and Other Necessities. This comprehensive framework allows care providers to accurately identify client needs and develop targeted intervention strategies that address the full spectrum of personal and social challenges.



**Community Connections Assessment:** The CityServeX Community Connections Assessment is a specialized tool designed to map an individual's existing support network by identifying family members, friends, and community groups that can serve as a reliable safety net during times of need. This comprehensive assessment helps Resource Coordinators visualize a client's social resources, recognize potential gaps in support, and develop strategies to strengthen community connections that promote long-term stability and resilience.



**Education & Vocational Assessment:** The CityServeX Educational and Vocational Assessment form systematically collects critical information about a participant's educational background, job skills, employment history, and career aspirations to identify suitable pathways toward stable employment with livable wages. This comprehensive evaluation tool enables CityServeX team members to recognize training gaps, match clients with appropriate educational opportunities, and develop personalized employment plans that align with both market demands and the participant's unique capabilities and interests.





**Financial Stability Assessment:** The CityServeX Financial Stability Assessment form meticulously documents a participant's income sources, debt obligations, banking status, credit history, and financial goals to create a comprehensive picture of their current economic situation and potential pathways to stability. This strategic evaluation tool enables Resource Coordinators to identify immediate financial barriers, develop personalized budgeting strategies, and connect participants with appropriate resources such as financial literacy programs, debt counseling, and assistance programs that can strengthen their financial foundation and increase access to monetary resources.

**Homeless Services Assessment:** The **CityServeX** Homeless Services Assessment form comprehensively documents a participant's current living conditions, barriers to housing stability, community support networks, income sources, possession of vital documents, and connections to partner organizations to develop a holistic understanding of their unique homelessness situation. This detailed evaluation tool enables **CityServeX** team members to identify critical intervention points, prioritize immediate needs, and create personalized housing plans that address both practical challenges and systemic obstacles while leveraging existing resources and support systems.



**Housing Needs Assessment:** The CityServeX Housing Needs Assessment form systematically collects comprehensive information about a participant's current living situation, personal details, income sources, vital document status, housing history, financial circumstances, and preferred housing locations to create a complete picture of their housing needs and opportunities. This strategic evaluation tool allows care providers to identify barriers to stable housing, determine eligibility for assistance programs, and develop tailored housing plans that align with both the participant's preferences and their financial realities.

**Housing Readiness Checklist:** The CityServeX Housing Readiness Checklist is a streamlined document that systematically verifies a participant's possession of essential identification documents and proof of income required by landlords and housing programs for successful placement. This practical assessment tool helps Resouce Coordinators identify documentation gaps, prioritize document acquisition, and ensure participants are fully prepared to secure and maintain stable housing when opportunities become available.

**Physical Health Needs Assessment:** The CityServeX Physical Health Needs Assessment is a comprehensive evaluation tool that documents a participant's complete health profile including mobility capabilities, cognitive functioning, nutrition status, dental health, insurance coverage, outstanding medical expenses, and legal disability status. This detailed health assessment allows care providers to identify critical healthcare gaps, prioritize immediate medical needs, and coordinate appropriate interventions across multiple health domains to improve the participant's overall wellbeing and functional independence.

Additional specialized assessment forms will be developed and integrated into this resource collection as new service needs are identified within our community. The ongoing expansion of our documentation toolkit ensures we can comprehensively address emerging challenges and unique client circumstances that may require targeted evaluation. Future assessment instruments will be cataloged and housed in this section to maintain a centralized, accessible repository of all Participant evaluation resources.

