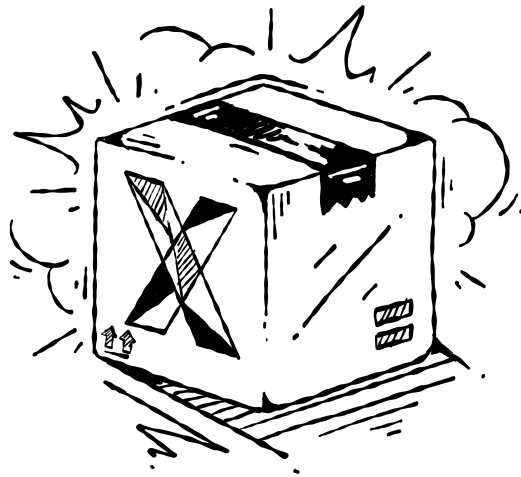




CityServeX "Box"
Care Champion Manual
Section 01, GETTING STARTED



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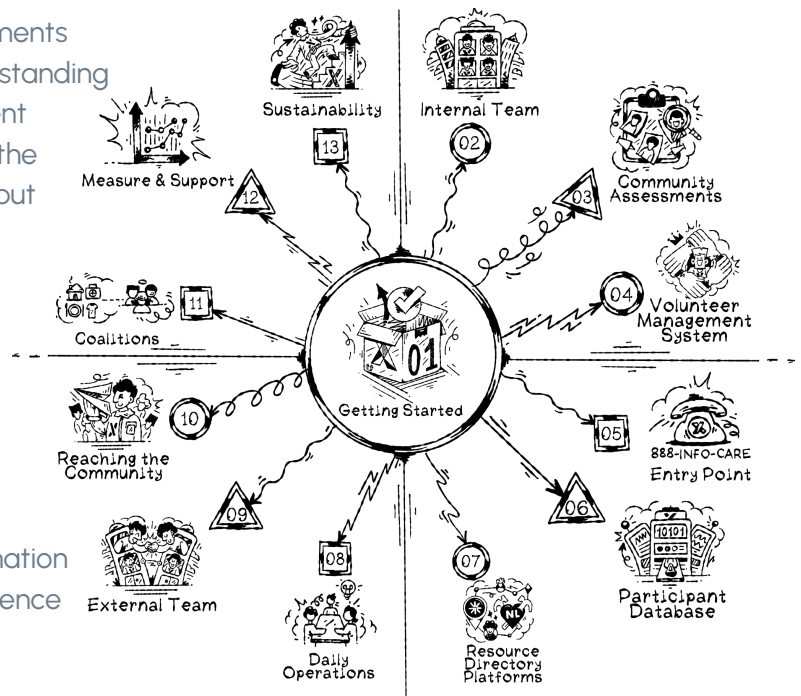
Welcome to Partnership with CityServeX

We are excited that you have chosen to bring Resource Coordination to your community with us. Resource Coordination is a pivotal point of connecting someone in need to the assets that exist around them. This is done through the role of a Resource Coordinator. CityServeX has created a "box" with multiple elements to facilitate bringing the service of Resource Coordination to your area. The instructions for the "Box" are simply referred to as the manual.

This manual is intended to provide the elements a variety of organizations may need understanding that Resource Coordination will look different for different organizations. The graphic to the right shows the various sections available, but not everyone will need everything.

Certain sections have been chosen to be provided out of order, but in the proper order for your organization.

Terms and Definitions and the CityServeX Story follows next. While not all may seem relevant it is recommended that the information be read to have a complete frame of reference as your work of Resource Coordination, in partnership with CityServeX, advances.





Terms and Definitions

1. **4 Lanes Model:** integrates business, faith communities, government, and non-profits into a unified approach for addressing social challenges. Each sector contributes its unique resources, expertise, and networks while collaborating across traditional boundaries. This integration creates a holistic ecosystem where public policy, market solutions, community services, and values-based outreach work together to maximize impact and create sustainable solutions.
2. **360 Neighborhood Assessment:** is a comprehensive evaluation tool used to identify community findings, recognize local heroes, understand collective dreams, and catalog valuable assets within a defined geographical area.
3. **Care Champion (CC):** is a dedicated leader who provides guidance and support to advance the mission, methods, and goals of their Site. They exemplify the core values essential for cultivating a healthy organizational culture that enables effective care delivery, meaningful relationship building, and measurable outcomes. Through their leadership, Care Champions create an environment where services can be delivered with excellence, authentic connections can flourish, and impact can be both achieved and documented.
4. **CityServeX Sites:** is an independent non-profit organization that has been granted permission to operate under the **CityServeX** name by adhering to the established protocols outlined in the Box. These Sites maintain their own organizational structure while benefiting from the **CityServeX** brand recognition, but must consistently comply with all standards and guidelines to preserve their affiliation status. Though often structured as separate non-profit entities, **CityServeX Sites** are united through their commitment to upholding the core values, operational frameworks, and quality standards that define the broader **CityServeX** mission.
5. **CityServeX "Box":** is a comprehensive resource package that equips national Sites with the essential components needed to effectively establish and operate urban service centers.





6. **Client Management System with findhelp Integration:** is a municipal client management system that integrates with findhelp's resource directory to streamline case management and service referrals for community organizations.
7. **CityServeX Liaison:** is the dedicated representative at **CityServeX** National Headquarters who serves as the primary point of contact for Care Champions (CC) across the network. This individual is responsible for training Care Champions, providing essential resources, and offering ongoing support to help local Sites successfully implement the **CityServeX** model in their communities. The Liaison is the direct connection to headquarters, ensuring consistent communication and alignment with the organization's mission and standards.
8. **CityServeX Resource Coordination Database (CSX RCD):** is a custom adaptation of Findhelp's list of free and discounted resources, tailored specifically to particular zip codes or regions.
9. **Coalitions:** are alliances between multiple groups, individuals, or organizations who unite around shared objectives despite potentially having different individual interests.
10. **Community Advocate:** is a dedicated individual who identifies and connects local heroes working across four distinct community sectors, facilitating their collaboration through monthly convenings focused on pressing social issues. This advocate serves as both a discoverer of hidden community talent and a convener who creates spaces for meaningful dialogue and collective problem-solving. Through their ability to recognize potential, build relationships, and foster creative approaches to community challenges, the Community Advocate catalyzes sustainable solutions that might otherwise remain undiscovered.
11. **Community Assets:** are resources—financial support, services, commodities—specifically identified to address a Participant's needs.
12. **Inform USA:** **CityServeX** has recently partnered with Inform USA to align our resource coordination practices with industry-leading standards. This strategic collaboration ensures that **CityServeX's** service delivery methods meet the rigorous benchmarks established by Inform USA's proven frameworks. Through this partnership, **CityServeX** aims to enhance operational efficiency while providing communities with more reliable and effective resource distribution systems.

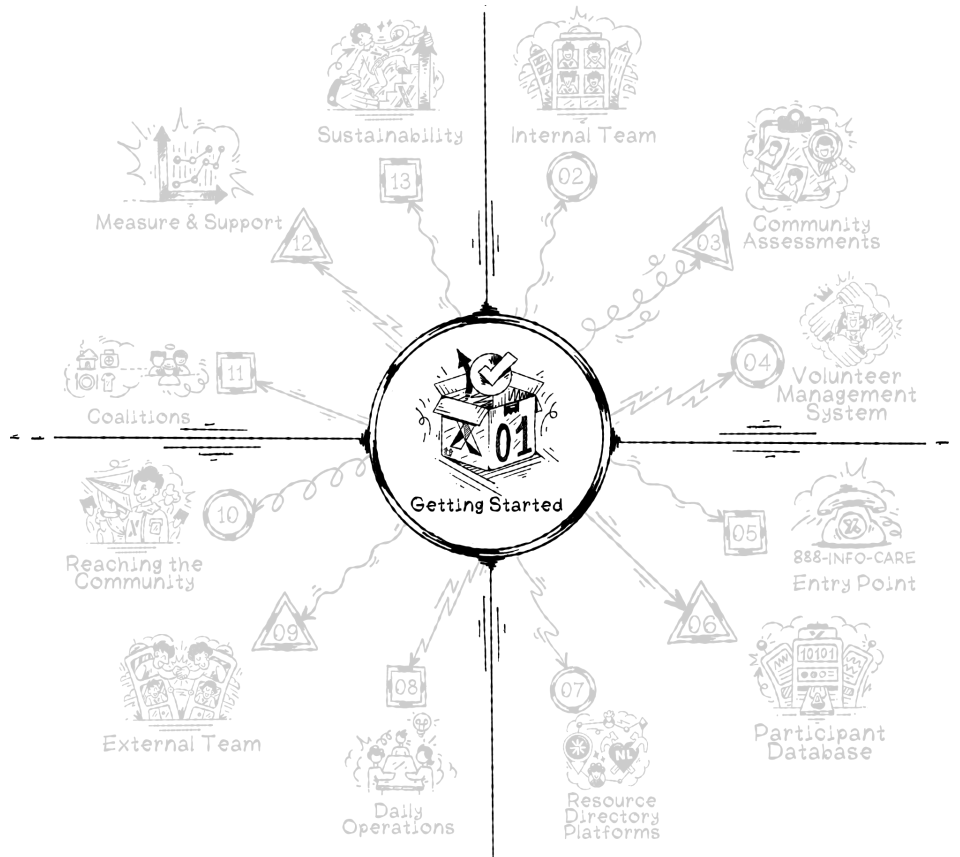


13. **Neutral Convener:** is a person who has no bias or stake in a particular outcome. Their role is to guide, motivate, build a bridge, bring peace, listen, elicit information, and lead discussion to a desired outcome.
14. **Participant:** an individual who is actively engaged in their journey toward self-sufficiency, equipped with personalized guidance and resources to navigate the often complex social service landscape.
15. **Resource Coordinator (RC):** is a compassionate individual who listens to a Participant's story and empathizes with their situation, creating a foundation of trust and understanding before exploring solutions together.
16. **Service Area:** is a strategically selected geographic boundary.
17. **Stakeholder:** a member of a Coalition that represents one of the 4 Lanes. These individuals are seen as having an interest in its success.
18. **Regional Assessment:** is a comprehensive assessment component created by Within Research that gathers, analyzes, and visualizes key data points across multiple sectors to create a holistic understanding of a community's current conditions.
19. **Volunteer Management System (VMS):** is a comprehensive digital platform that streamlines the recruitment, scheduling, and coordination of volunteers for community service initiatives throughout the city.
20. **Welcome Agent (WA):** is a frontline staff member who warmly greets all guests upon arrival and answers incoming phone calls, serving as the first point of contact for the organization. They handle a variety of administrative tasks, including scheduling appointments, providing directions, and managing visitor registration, while setting a professional and welcoming tone that represents the organization's values. The Welcome Agent also offers suggestions regarding available services, nearby amenities, and optimal times to return if needed, ensuring visitors have all the necessary information for a positive experience.





#1: Getting Started: Introduction





Introduction

Now that you have some context through Terms & Definitions, it's important to know the genesis of **CityServeX** to understand where it started, which has led us to where we are today.

The **CityServeX** Story

Roger Valci, President of **CityServeX**, saw people in need in the San Francisco Bay area of California some 20 years ago being served by non-profit organizations, government agencies, churches, and even businesses at times. Most often, they did not work together easily, and this generated its own set of problems, but it also made it less efficient for people in need. In addition, there remained gaps for individual needs to be met because an entity did not exist to meet the need, yet Roger knew that an array of resources existed in the residents of any given community. So as a pastor with relationships across multiple sectors, he created networks and groups to facilitate sectors working together while mobilizing volunteers to come together for the good of those residing in their communities.

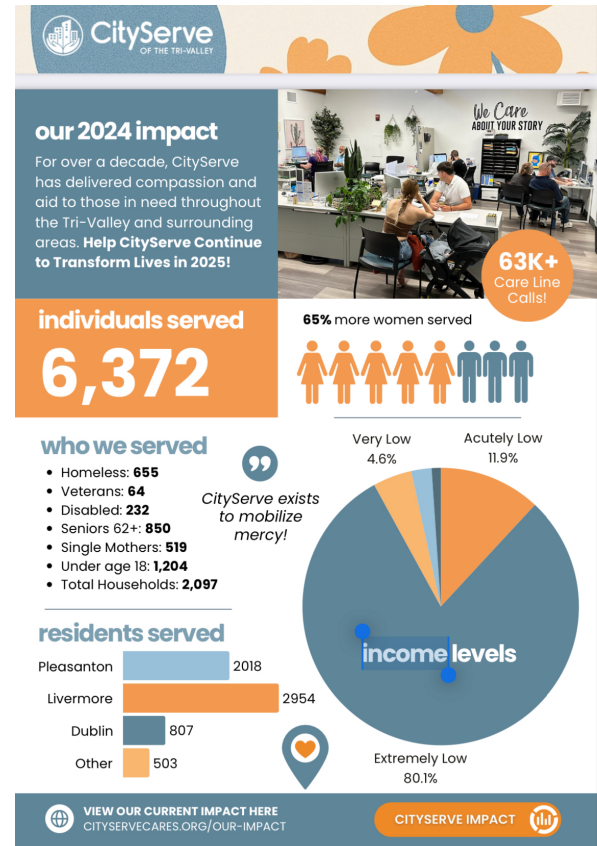
This eventually became a formalized effort and birthed CityServe of the Tri-Valley in 2012 for the purpose of serving the Dublin, Pleasanton, and Livermore communities of California.





The concept became so effective that by 2024, they had grown to assist more than 6,000 individuals annually through direct aid, housing assistance, and crisis intervention programs, and received over 63,000 calls on its 222-CARE hotline. CityServe of the Tri-Valley started with an annual budget of \$180,000, but as of 2024, it is now managing over \$3.2 million in resources.

This is a story of such promise that when Roger Valci moved to Central Florida in 2023, he brought more than a vision — he brought a proven model. With the full blessing and support of CityServe of the Tri-Valley, the organization he had built from the ground up in the San Francisco Bay Area, Roger set out to replicate what he had seen work, not just in Florida, but across the country.



Building upon the successful framework of its first operational hub, [CityServe of the Tri-Valley](#), which had already exemplified how communities could unite to create lasting social impact, Roger remained committed to the same conviction that had driven him from the beginning: bringing the sectors together for the sake of others. He understood that the power of this model lay not in any single organization, but in what happens when the right sectors stop working in isolation and start sharing the road. Businesses, faith communities, government agencies, and nonprofit organizations each occupy their own lane — and each lane matters. But Roger had seen what becomes possible when those four lanes run alongside one another, coordinated and moving in the same direction. He wanted a symbol that embodied that ideal, something that could hold the vision together as it grew. Thus, **CityServeX** was born, and with it a tagline that captures its core conviction: **Everyday. All Lanes.**





The model of coordinated care and community partnership that had proven itself so effectively in the Tri-Valley became the blueprint for everything CityServeX would become. It is a model built not around a single service or a single sector, but around the practice of **Resource Coordination** — and it is this approach that CityServeX now aims to replicate in a hundred cities across the United States.

Resource Coordination, when delivered through a framework that genuinely unifies businesses, faith communities, government agencies, and nonprofit organizations, dramatically increases both the effectiveness of service delivery and the overall number of resources available to those in crisis. Rather than leaving individuals to navigate a fragmented system on their own — bouncing from one agency to the next, falling through gaps that no single organization was designed to fill — this comprehensive approach ensures that people in crisis receive immediate support while also gaining access to a broad spectrum of services across multiple sectors. The result is not just better care in the moment, but a stronger, more connected community over time.

With this as our beginning, here is our Mission, our Purpose and our Vision. Read each one carefully to capture WHY CityServeX exists, HOW we provide a solution and our IDEAL of a better world.



CityServeX exists to uncomplicate and humanize social services for all

— helping people who help people find what they need.

so that one day no one will ever have to go through crisis alone.





CityServeX Values

To fulfill our mission and chase our vision, our work is anchored in four fundamental values that guide every aspect of our operations:

STORIES: People Over Process - We recognize that behind every intake number and application form is a human story. By prioritizing people over bureaucratic processes, we ensure that systems serve individuals rather than the other way around.

EMPATHY: Emotional Connection - We believe that genuine understanding comes from emotional connection. By fostering empathy among all stakeholders, we create services that truly respond to human needs and experiences.

CREATIVITY: Connecting the Dots - Innovation often comes from seeing new connections between existing resources and ideas. We actively seek creative solutions by bringing together diverse perspectives and approaches.

EMPOWERMENT: Respecting People's Right to Lead Themselves - We firmly believe that individuals and communities know best what they need. Our role is to support and enable their vision for their success, not to impose solutions from above.





CityServeX Belief in the 4 Lanes

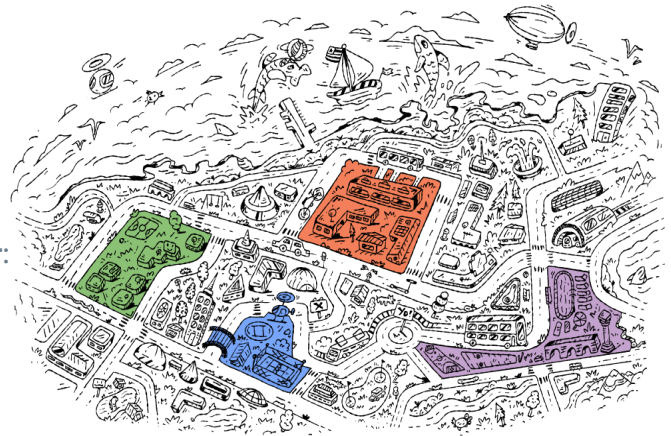
As told as part of the **CityServeX** story, we believe that effective change in social services best happens when multiple stakeholders work together. We see the essential stakeholders as the four lanes of Business, Faith, Government, and Non-Profit.

Some of the ways these stakeholders may contribute to the area of social services are as follows:

- Businesses contribute to efficiency and technological innovation
- Faith communities offer trusted community connections and moral guidance
- Government agencies provide the framework and resources for systemic change
- Nonprofits deliver specialized expertise and direct service excellence

The results can be a comprehensive approach that:

- Maximizes available resources and eliminates duplication
- Creates more efficient and accessible service delivery
- Builds trust across different community segments
- Ensures long-term sustainability through diverse support
- Promotes innovative solutions through cross-sector learning



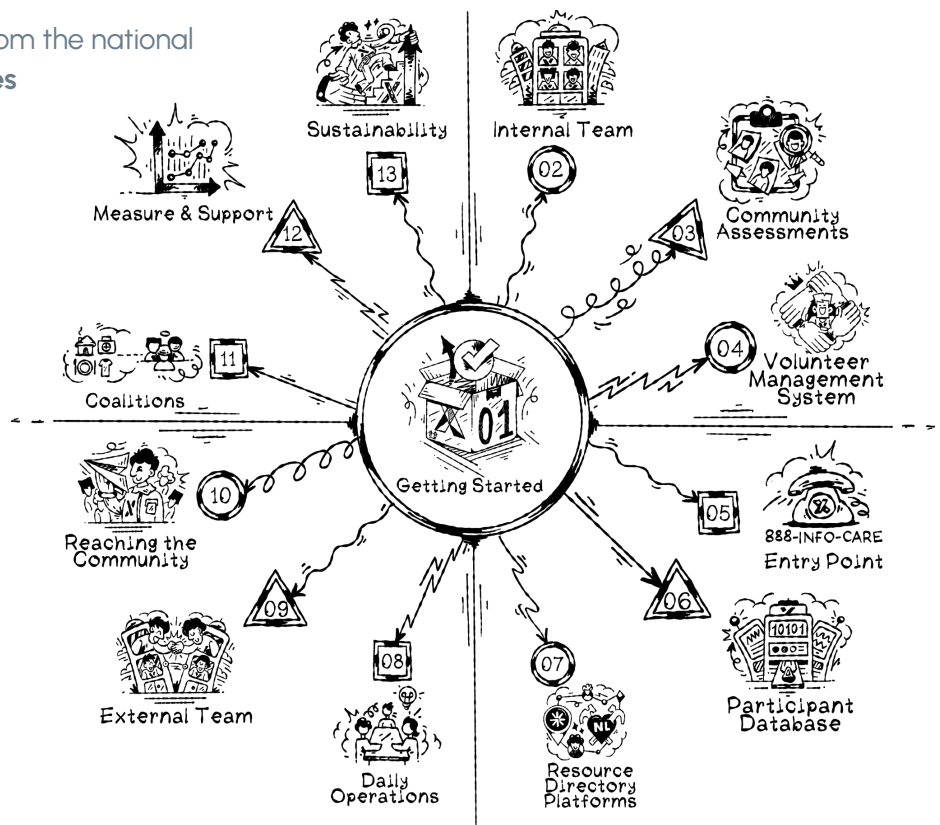


The CityServeX “Box”

The **CityServeX “Box”** provides a comprehensive suite of resources, tools, and training materials designed specifically for organizations launching **CityServeX Sites** in communities throughout the nation. This turnkey solution includes everything from community assessments and digital platforms to operational frameworks, a national phone number, and a continuous feedback loop. This level of support enables **Sites** to quickly establish effective local service networks.

Each “**Box**” is backed by ongoing training and support from the national **CityServeX** team, ensuring **Sites** can navigate challenges while implementing proven models for community transformation.

By equipping local leaders with this standardized yet customizable resource, the **CityServeX “Box”** empowers communities of any size to efficiently mobilize resources and address critical needs through coordinated, compassionate action.





Resource Coordination - Overview

Many wonderful agencies exist in all spheres of society. Businesses, Faith communities, Government agencies, and Non-Profit organizations all possess many resources. Some are harnessed to help people, and others lie dormant, never discovered or organized to help the community around them. Resource Coordination is the process of discovering, coordinating, and utilizing those various resources for the benefit of those in crisis.

This is not a new concept. Resource Coordination often happens organically within institutions or individual lives when trying to help someone. It can even be a purposefully designed role, most often seen in a non-profit organization. It may go by another name, such as Navigator and sometimes Care Manager, or even Assistant.



What is not common practice is the accessibility of a Resource Coordinator outside of a Non-Profit that is delivering its own services. It is also not common practice that a Resource Coordinator role functions within another entity, such as a church, for example. And lastly, Resource Coordination can sometimes be seen in

a role where someone provides information, either over the phone or in person, but the recipient is often left to find their way to each resource provided.

Resource Coordination, as it is so often done (if at all), is many times impersonal and quick. CityServeX has seen and is convinced that Resource Coordination, as a purposeful, dedicated, relational effort, is an essential part of any community helping their residents in need. It enables them to efficiently find not only the resources that exist, but also find resources that are unknown but live within a community's boundaries, in particular, businesses and churches.

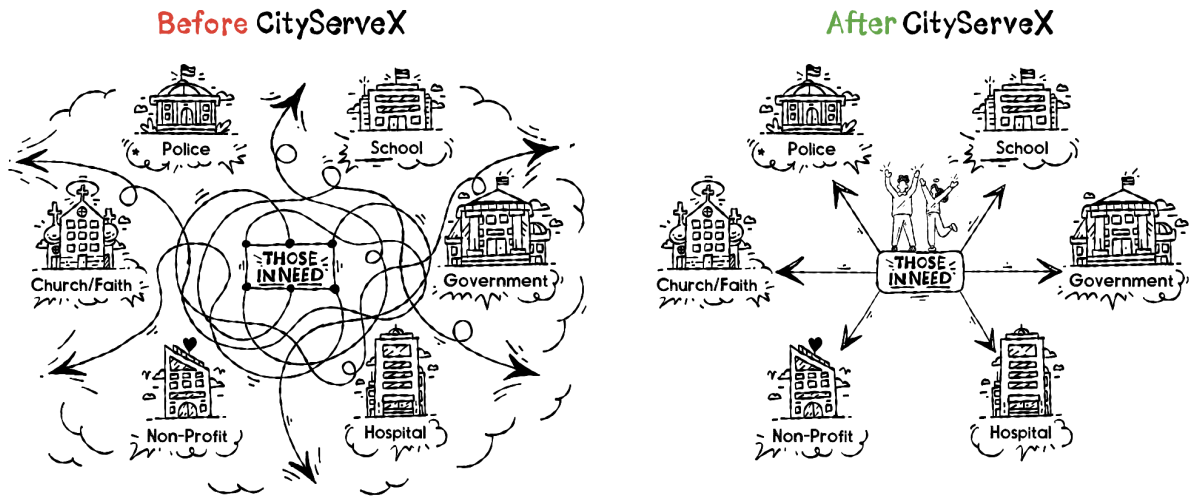
The goal of Resource Coordination is to maximize the efficiency of the search for assistance (resources) for the person in need of them, but to do so in a way that is relational and impactful, while helpful.

Without Resource Coordination, a community's landscape can often look like the picture below (on the left) when it comes to navigating it to find resources and solutions.





We believe Resource Coordination can change the way a person navigates the community's landscape to look like the picture below (on the right).



Important Note -

Resource Coordination is not Case Management in the clinical sense, nor does it deliver any service directly beyond Resource Coordination in and of itself. Resource Coordination is the intentional effort of guiding people in crisis through a maze to show them the straight paths available.





Before Getting Started - Comprehension Questionnaire

Before moving forward, we'd like to invite you to pause and reflect on what you've read so far.

The following questions are designed to help you confirm that you're ready to speak confidently about **CityServeX** and Resource Coordination with others. There are no trick questions and no wrong answers — just an opportunity to put what you've learned into your own words.

Review the questions below, then **complete and submit your responses using the link provided.**

Question 1 In your own words, what is the mission of **CityServeX**, and what problem does it exist to solve?

*Think about the origin story, the gaps that existed in community services, and what **CityServeX** set out to do differently.*

Question 2 **CityServeX** operates on a "4 Lanes" model. Who are the four stakeholders, and why does **CityServeX** believe all four are necessary?

Question 3 How would you explain Resource Coordination to someone who has never heard of it — and what makes the **CityServeX** approach different from the way it's typically done?

*Consider what Resource Coordination is, what it is not, and what **CityServeX** believes is missing when it's done poorly or not at all.*





Question 4 If someone asked, "Why does this matter? Can't people just find resources on their own?" — how would you respond?

Draw on the "before and after" of Resource Coordination and the goal it's designed to achieve.

Question 5 Which of CityServeX's four core values resonates most with you personally, and how do you see it showing up in the work of a Resource Coordinator?

Stories – People Over Process | Empathy – Emotional Connection | Creativity – Connecting the Dots | Empowerment – Respecting People's Right to Lead Themselves

Overall Confidence Rating

How confident do you feel in your ability to explain CityServeX and Resource Coordination to someone who has never heard of either?

Circle one:

1 — Not confident yet

2 — Somewhat unsure

3 — Getting there

4 — Mostly confident

5 — Very confident





Notes — what would help me feel more prepared:

Feedback — we welcome any comments from you that would help us improve the content of this section:

 [Click here to submit your responses](#)





Resource Coordination - One Step at a Time

With your responses submitted and Section 1 behind you, it's time to think about the people who will make Resource Coordination a reality in your community.

Next up is Step 2 — Building Your Team.

As we move forward together, keep this in mind: this is a Pilot Program, and collaboration is at the heart of it. The framework is set for you, but the impact in your community will be shaped by the work we do together — so a team mindset is essential.

We are grateful to be partners with you in this journey. Let's get building.

WELCOME TO THE CITYSERVEX TEAM!

