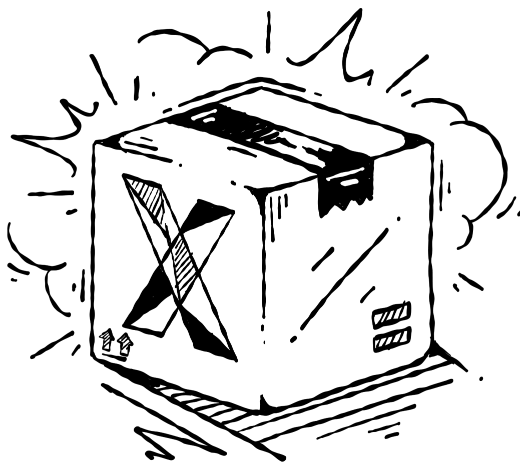

CityServeX "Box"
Care Champion Manual
Section 08, DAILY OPERATIONS

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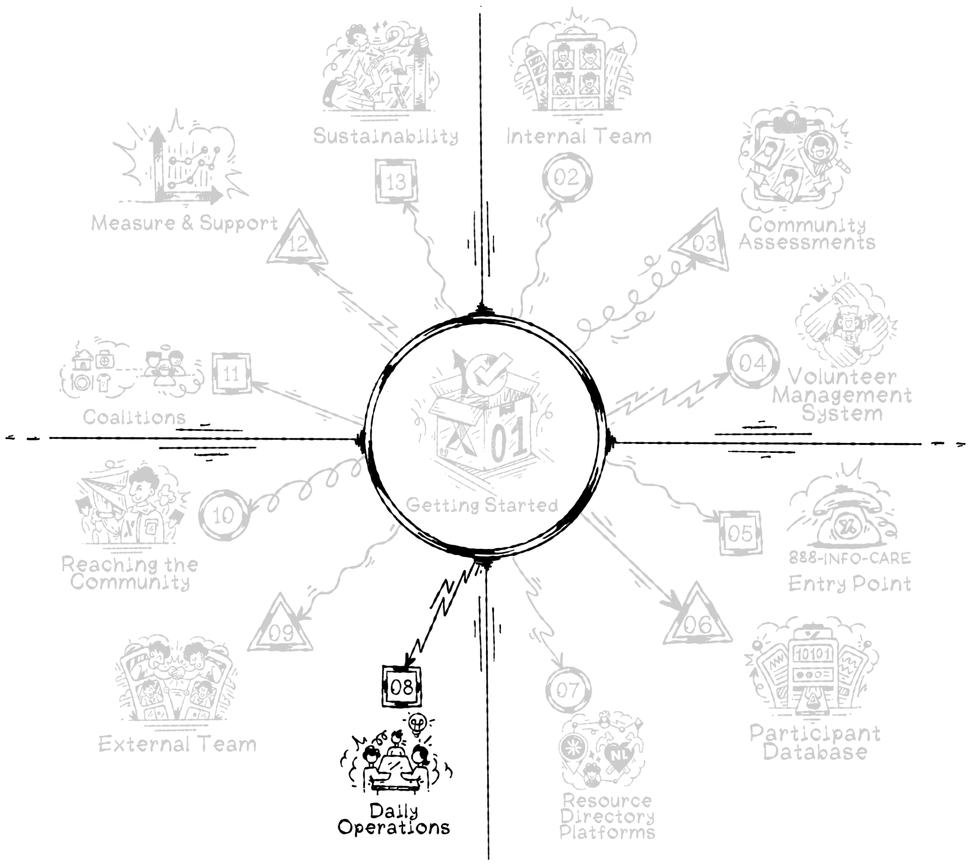


Daily Operations

Introduction to 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 different organizational structures and operational frameworks.

But first, read the following pages on Resource Coordinator Guidelines: Walking Alongside Participants, and Faith and Boundaries in Resource Coordination, then let's begin!

8.1 Resource Coordinator Guidelines: Walking Alongside Participants

As a Resource Coordinator, you bridge the gap between crisis and stability by connecting people with resources and possibilities. Your approach should always reflect CityServeX's core values:

- **STORIES:** People Over Process
- **EMPATHY:** Emotional Connection
- **EMPOWERMENT:** Respecting People's Right to Lead Themselves
- **CREATIVITY:** Connecting the Dots

Your Role in Practice

Lead with Empathy and Active Listening - Begin every interaction by creating space for the participant's full story. Listen without judgment, acknowledging both their challenges and their courage in seeking support. Your genuine emotional connection builds the trust necessary for meaningful collaboration.

Honor Their Agency - You are a guide, not a director. Your role is to illuminate pathways and present options—never to prescribe solutions or make decisions for participants. Every person has the right to lead their own life, even when their choices differ from what you might recommend.

Build on Existing Strengths - Approach each conversation as a partnership between equals. Recognize that participants are resourceful individuals who bring their own strengths, connections, and capabilities to the table. Help them identify assets they may have overlooked, and frame your support as building upon what they already possess.

Think Creatively - Resource coordination isn't about following a script—it's about connecting dots others might miss. Explore unconventional solutions, tap into unexpected community networks, and help participants see possibilities they hadn't considered.

Maintain Hope and Perspective - Your optimism can be a powerful resource in itself. Even in difficult circumstances, maintain an encouraging attitude that reflects your belief in the participant's capacity for positive change. Every interaction is an opportunity to remind someone of their inherent worth and potential.

Resource Coordinators don't promise solutions, but believe that the situation is promising.

Your engagement gives hope and help—both are needed in balance.

8.2 Faith and Boundaries in Resource Coordination

CityServeX welcomes volunteers of all backgrounds and serves everyone with dignity and respect, regardless of their beliefs. As a Resource Coordinator, you are expected to treat each participant with impartiality and care, partnering with them to create solutions that align with their needs and goals—not directing or controlling their choices based on your personal convictions.

Guidelines for Faith-Based Conversations (outside of a faith community setting)

Your primary role is to help Participants explore their options and navigate available resources. To ensure Participants understand they will receive consistent, unbiased support regardless of their beliefs, please observe these guidelines:

- **Participant-led conversations**: If a Participant initiates a conversation about faith, you may respond naturally and authentically.
- **Concluding offers**: At the end of an interaction, you may offer to pray with them or briefly share your personal beliefs—but only after their immediate needs have been addressed and only with permission..
- **Appropriate referrals**: If a Participant expresses a genuine interest in exploring faith, you may recommend local places of worship as you would any other community resource. However, invitations to your personal church are not appropriate, as they may create a perception of pressure or favoritism.

When in Doubt

If you're uncertain about how to navigate a situation, consult your Care Champion before responding. They can help you develop an approach that honors both the Participant's dignity and your role as a Resource Coordinator.

Your commitment to respectful, participant-centered care is what makes CityServeX's mission possible. Thank you for honoring these boundaries.

8.3 Getting Your Assignments

Depending on how your organization functions, you may meet a Participant for the first time in person, or you may talk to them on the phone first. If you are talking to them on the phone, you are likely returning a call after someone has left a message asking for assistance. The following instructions are to aid you in various scenarios, from returning calls to having in-person meetings.

8.4 Returning a Phone Call / Step-by-Step Visual Guide 📞

Before You Call - Prepare

- Choose a private location with minimal distractions
- Have your computer open and ready before you call
- Set up earbuds or headphones so your hands are free
- Have an Intake Form available — digital or paper
    - Instructions in Addendums section, Assessments-Intake Forms
- Keep a writing tablet nearby for quick notes

Step 1

- Call the number assigned to you in the CSX platform.

🔀 Do they answer?

✗ No Answer

Leave a voicemail. Identify yourself and the 888-INFOCARE line. Let them know you or another team member will try again, and your call will come from 888-463-6227.

✓ They Answer

Introduce yourself. Explain you received their message on 888-INFOCARE and you're here to help find resources.

🔀 **Are they willing to proceed?**

✗ **Not Interested**

Respect their decision. Let them know they're welcome to call back anytime.

✓ **Yes — Proceed**

Let them know you'll need about 30 minutes to gather some information.

Ask if they have that much time.

🔀 **Do they have time now?**

✗ **Not Right Now**

Schedule a phone call, in-person or virtual meeting. **When it occurs, return to this section of the manual and proceed where it reads below: Begin with the Intake Form, or refer to 8.5 section if your appointment will be in-person, 8.6 section if it will be virtual.**

✓ **Yes — Continue**

Begin the Intake Form. (See Addendums section, Assessments-Intake Forms)

Step 2

- Work through the Intake Form and Care Wheel together.
- Listen actively. Paraphrase to confirm understanding. (See Addendums section-Active Listening).
- Make notes about their story in the Additonal Notes section of the Intake Form.
- Check how much time you have left in your 30 minutes.

🔀 **Is there time left to keep going?**

✗ **No**

Schedule a phone call, virtual meeting, or in-person meeting. **When it occurs, return to this section of the manual and proceed where it reads below: Search for resources, or refer to 8.5 section if your appointment will be in-person, 8.6 section if it will be virtual.**

✓ **Yes — Continue**

Search for resources. Take no more than 45 minutes total.

Step 3

- Search cityservexteam.findhelp.com by zip code.
- Share findings as you go.
- Offer one or two resources at a time — don't overwhelm.
- If you can't find something, assure them you'll keep looking. - do not promise to solve their problem.
- Remind them they are not alone, and there is always hope.
- **Encourage their resourcefulness:** Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
- **Goal setting:** If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

🔀 **Were their needs met?**

✓ **Need Met**

Conclude the call.

Step 4

888-INFO-CARE
info@cityservex.org
601 Market St. #471034
Celebration, FL 34747

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they reached out.
- Ask if they have any questions.
- Let them know they can always call 888-INFOCARE again or search independently for resources at CityServex.help (no login required).

✗ More Needed

Conclude the call.

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they reached out.
- Ask if they have any questions.
- Schedule a 45-minute in-person, follow up meeting to keep working with them.
  - If they decline, offer a virtual meeting or follow up call.
    - If they still decline, respect their decision.
      - Remind them they are always welcome to call again.
  - If they agree to another meeting, agree on purpose, date, time, and format.
    - Review next steps for both of you.
      - This could be work they need to do on goals set, or inquiries they need to make, agencies they need to contact, etc.
      - This could be research you will conduct, information you will gather, etc.
    - Remind them to contact you if they need to cancel.

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

Step 5

- Document brief notes in the **Navigation History** section of the CSX/Findhelp platform.
- Document elements of their story in **Additional Notes** section of the Intake Form.
- Set a **Follow Up Date** in the CSX/Findhelp platform if warranted.
    - OPTIONAL: Add a reminder to your personal calendar.

8.4.1 Returning a Phone Call / EXPANDED VERSION

Preparation

Choose a place that offers privacy for a conversation with minimal distractions.

It is likely you will need earbuds or headphones so your hands are free for notetaking, etc.

Before returning a call, have your Intake Form with built-in Care Wheel either in hand or pulled up digitally so it can guide your conversation.

- Instructions for the Intake Form are located in the Addendums section, Assessments-Intake Forms.

Also, have a writing tablet nearby in case it is quicker to make handwritten notes and backfill the online Intake Form and the Navigation History later.

Returning Calls

When calling someone who has left a message and is flagged within the CSX platform, you should:

If the call is unanswered -

- **Leave a message -** let them know you are calling because you received a message from them on the 888-INFOCARE line. You are with CityServeX in ___________________________ (area), and you are here to help them find resources. Or, you may say that you are with ___________________________(organization name), and you would like to help them find resources.

  Let them know you or another team member will try again, but this (888-463-6227) is the number they will see on their phone in the future

If the call is answered -

- **Introduce yourself** - let them know you are calling because you received a message from them on the 888-INFOCARE line. You are with CityServeX in ___________________________ (area), and you are here to help them find resources.

Or, you may say that you are with ___________________________(organization name), and you would like to help them find resources.

Ask, "Does that sound good to you? Would you like me to try and help you find what you need?" (GIVE TIME FOR THEM TO ANSWER)

- If yes, proceed with letting them know you need to gather some personal information in order to assist them. It will take about 30 minutes. Ask if they have the time or if they want to schedule a time to talk. (GIVE TIME FOR THEM TO ANSWER)
    - If they have time to talk, proceed. (See next page.)
    - If they don't have time now, schedule another phone call, or an in-person meeting agreeable to both of you. **When it occurs, return to this section of the manual, page 16, under *If the call proceeds*, or refer to 8.5 section if your appointment will be in-person.**
    - If no, or unsure, ask if you could answer any more questions for them, or if they could explain why they are not interested in the services of CityServeX or ___________________________(organization name).

***NOTE:** They may not answer either, but may ask about what you do, or can do for them, or they may ask a direct question such as, "Can you help me find rent money?" In any case, explain that you are a volunteer who works with people in need to help them find what they need. You can't guarantee an outcome, but you've found that having 2 people working together is often better than someone trying to do everything on their own. You may need to ask again at this point, "Does that sound good to you? Would you like me to try and help you find what you need?" (GIVE TIME FOR THEM TO ANSWER)

At this point, either proceed or conclude the call.

If the call is concluded -

- **Let them know you respect their decision** and that they are always welcome to call back if they change their mind.

If the call proceeds -

- **Refer to the Intake Form and Care Wheel** (See Addendums section, Assessments-Intake Forms)
- **Listen actively** and paraphrase to confirm understanding. (See Addendums section-Active Listening)

- **Make notes about their story** in the Additional Notes section of the Intake Form.
- **Upon completion of the Intake Form** thank them and explain that you have a website where you will look for resources for them.
- **Ask if they are okay on time (if the intake process took a while).**
    - If no, set another call, a virtual meeting, or an in-person meeting.
        - If they don't have time now, schedule another phone call, or an in-person meeting agreeable to both of you. **When it occurs, return to this section of the manual, page 17, under *Continuing the Call and Looking for Resources*, or refer to 8.5 section if your appointment will be in-person, 8.6 if it will be virtual.**
            - Refer to Guidelines for In-Person Meetings in Addendums section.
    - If yes, continue.
        - Be mindful of the time. The entire call should take no longer than 45 minutes.

Continuing the Call and Looking for Resources -

- Mention that you are glad they can take a little more time for you to explore what relevant resources might be available for them.
- Look for resources via zip code on cityservexteam.findhelp.com
- Inform them as you go along with what you are finding, and use the platform accordingly (Referrals, Sharing, etc.).
- Try to give them at least one resource before concluding the call.
    - Give bite-sized pieces - one or two things at a time
        - Don't overwhelm them
        - People in crisis often can't think through more than a little at a time
- If you can't find a resource or need to locate more, assure them that you will keep looking, but do not promise that you will solve their problem.
- Emphasize that there is hope because they are not alone now, and you are going to explore what options and resources are available.
- Encourage their resourcefulness: Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
- Goal setting: If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

Conclude the call

If you have met their need -

- Wind down the call, and ask: *"What can we celebrate today?"* - there is always something.
- Thank them for trusting you and working with you.
- Ask if they have any questions.
- Remind them they can always call 888-INFOCARE again if they need assistance in the future.
- Tell them about searching independently for resources at CityServex.help (no login required).

If you have not met their need or have more to do -

- Wind down the call, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they reached out.
- Let them know you want to look into some more options/resources.
- Ask if you could schedule a time to meet with them IN PERSON, help them find what they need. It would take about 45 minutes.
- If they are open to this, set the date, time, and location in accordance with established guidelines.
  - Refer to Guidelines for In-Person Meetings in Addendums section.
  - Mention that you will not be purchasing anything (if that is an option), and they should not either.
  - Make sure that they will not be bringing children that require supervision (if applicable).
- If they are hesitant, let them know that we like to approach serving people in a relational way, and our work can achieve better results when we have a chance to get to know people. Working over the phone is challenging, and we prefer to meet in person as we are not a call center.

If you have a meeting set -

- Thank them for trusting you and working with you.
- Ask if they have any questions.
- Remind them of the date, time, and location, and no purchases, and no children.
- Let them know you'll remind them, and to PLEASE contact you if they have to cancel, so you have the opportunity to assist someone else.

- Give them your extension and how to reach you via the 888-INFOCARE line if warranted (888-463-6227).

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

If they will not schedule an in-person meeting -

- Schedule a follow-up phone call or a virtual meeting if they have the technology to do so (Zoom, Google Meet, or Teams).
- Make sure you have a clear idea as to what is still needed (so you can do your research).
- Let them know you will look into some more options/resources.
- Remind them of the date, time, and technology (if applicable) you set for the next phone call or virtual meeting.
- Let them know you'll remind them, and to PLEASE contact you if they have to cancel, so you have the opportunity to assist someone else.
- Give them your extension and how to reach you via the 888-INFOCARE line if warranted (888-463-6227).

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

Document

It's important to make brief notes of your interactions and/or communications with a Participant **on the CSX/Findhelp platform in the Navigation History section of the Participant's profile.**

- An example might be of when you tried to reach them, or when you met with them and what you accomplished, or when you called them and what they told you was their need was.
    - This is different than making notes on the Additional Notes portion of the Intake Form. Elements of their story should be captured there.

- This ensures there is always a record of your communication history, which will be beneficial to you and your team in serving the Participant in the future.

Make a calendar entry in the **CSX/Findhelp platform in the Follow Up Date section of the Participant's profile if warranted.**

- You may also opt to make an additional calendar entry on your own personal calendar.

8.5 In-Person First Meeting / Step-by-Step Visual Guide 🤝

🔀 **How did this meeting come about?**

Scenario 1

Participant agreed in advance to meet with a Resource Coordinator.

Scenario 2

Participant walked in seeking help and was directed to meet with a Resource Coordinator.

Both scenarios follow the same steps below. **Key difference:** Scenario 2 participants may not know what a Resource Coordinator does — be ready to explain clearly.

Before They Arrive - Prepare

- Refer to Guidelines for In-Person Meetings in Addendums section
- Arrive early and have your computer open and ready
- Have an Intake Form available — digital or paper
    - Instructions in Addendums section, Assessments-Intake Forms
- Keep a writing tablet nearby for quick notes

⚠️ **Remember:** Minimize time looking at your screen or notepad while the Participant is speaking. Give your full attention. Take notes after they finish sharing.

Step 1

- Welcome & Introduce Yourself.
- Smile and greet them warmly.
- Explain that you are a volunteer Resource Coordinator here to help them find resources.
- Let them know you don't work alone — you're part of a team.
- **Set the expectation:** the meeting will take about 45 minutes.

Step 2

- Work through the Intake Form and Care Wheel together. (See Addendums section, Assessments-Intake Forms).
- Listen actively. Paraphrase to confirm understanding. (See Addendums section-Active Listening).
- Make notes about their story in the Additonal Notes section of the Intake Form.
- Check how much time you have left in your 45 minutes.

Step 3

- Search cityservexteam.findhelp.com by zip code.
- Share findings as you go.
- Offer one or two resources at a time — don't overwhelm.
- If you can't find something, assure them you'll keep looking - do not promise to solve their problem.
- Remind them they are not alone, and there is always hope.
- **Encourage their resourcefulness:** Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
- **Goal setting:** If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

🔀 Were their needs met today?

✓ Need Met

Conclude the meeting.

Step 4

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions.

- Let them know they can always work with a Resource Coordinator again or search independently for resources at CityServex.help (no login required).

✗ **More Needed**

Conclude the meeting.

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions.
- Schedule a 45 minute in-person, follow up meeting to keep working with them.
    - If they decline, respect their decision.
        - Remind them they're always welcome to return.
    - If they agree to a meeting, agree on date, time, and if same location or different.
        - Review next steps for both of you.
            - This could be work they need to do on goals set, or inquiries they need to make, agencies they need to contact, etc.
            - This could be research you will conduct, information you will gather, etc.
        - Remind them to contact you if they need to cancel.

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

Step 5

- Document brief notes in the **Navigation History** section of the CSX/Findhelp platform.
- Document elements of their story in **Additional Notes** section of the Intake Form.
- Set a **Follow Up Date** in the CSX/Findhelp platform if warranted.
    - OPTIONAL: Add a reminder to your personal calendar.

8.5.1 In-Person First Meeting / EXPANDED VERSION

You may be serving in a live situation where you are not interacting with people over the phone for the first time, but instead, IN PERSON.
They have either -

1) been told about the service of Resource Coordination, have agreed to meet with someone, and now here you are, about to meet your assigned Participant.
2) have walked into an organization, i.e., non-profit, church, or otherwise, looking for assistance. The person was told about the first step being to speak to a Resource Coordinator, and now here you are, about to meet your assigned Participant.

Let's look at each scenario a little differently -

Scenario 1 - Participant has agreed to meet with a Resource Coordinator

Preparation

Refer to Guidelines for In-Person Meetings in Addendums section

Before meeting them, have your Intake Form with built-in Care Wheel either in hand or pulled up digitally so it can guide your conversation.

- Instructions for the Intake Form are located in the Addendums section, Assessments-Intake Forms.

Also, have a writing tablet nearby in case it is quicker to make handwritten notes and backfill the online Intake Form later.

*NOTE - **It is important to make eye contact and remain engaged during an in-person meeting.** Be aware of how much you work on your computer or write on a notepad while completing the Intake Form. Try to give your complete attention while listening to their story. Make some notes after your Participant has finished sharing.

Meeting

When they enter the location, or room, and approach you, standing or shaking their hand is optional, but you should:

- **Wear a smile and introduce yourself** - let them know you are glad they've come to see you. Even though they have agreed to meet with you, a Resource Coordinator. Do not assume that they understand what that means and how you assist.

- **Explain that you are a volunteer and your role is to help them find resources.** Explain that you understand it can be challenging for people to find what they need, particularly all by themselves. You want to help people uncomplicate the search and provide a guide for them in their journey for information and solutions.
- **Mention that you don't work alone -** but as part of a team with CityServeX or ______________________(organization name).
- **Inform them that the meeting today will take about 45 minutes -** and you'll have questions for them, and you want them to tell you more about themself and their situation.
- **Refer to the Intake Form and Care Wheel** (See Addendums section, Assessments-Intake Forms).
- **Listen actively** and paraphrase to confirm understanding. (See Addendums section-Active Listening).
- **Make notes about their story** in the Additional Notes section of the Intake Form.
- **Upon completion of the Intake Form -** thank them and explain that you have a website where you will look for resources for them. **The time for this should be built into the 45-minutes you've allotted.**

Look for resources -

- Look for resources via zip code on cityservexteam.findhelp.com
- Inform them as you go along with what you are finding, and use the platform accordingly (Referrals, Sharing, etc.)
- Keep an eye on the time.
- Try to give them at least one resource before concluding the meeting.
    - Give bite-sized pieces - one or two things at a time
        - Don't overwhelm them
        - People in crisis often can't think through more than a little at a time
- If you can't find a resource or need to locate more, assure them that you will keep looking, but do not promise that you will solve their problem.
- Emphasize that there is hope because they are not alone now, and you are going to help them find what options/resources are available.
- Encourage their resourcefulness: Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
- Goal setting: If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

Conclude the meeting

If you have met their need -

- Wind down the meeting, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions.
- Remind them they can always call 888-INFOCARE again if they need assistance in the future.
- Tell them about searching independently for resources at CityServex.help (no login required).

If you have not met their need or have more to do -

- Wind down the meeting, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Let them know you want to look into some more options/resources.
- Ask if you could schedule a time to meet again with them IN PERSON to help them find what they need. It would take about 45 minutes.
- If they are open to this, set the date, time, and confirm the location if the same or different.

If you have a meeting set -

- Thank them for trusting you and working with you.
- Ask if they have any questions.
- Let them know you'll remind them, and to PLEASE contact you if they have to cancel, so you have the opportunity to assist someone else.
- Give them your extension and how to reach you via the 888-INFOCARE line if warranted (888-463-6227).

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

If they will not schedule another meeting -

- Thank them for the opportunity to help them.
- Remind them they are always welcome to come back for assistance with resources.

Document

It's important to make brief notes of your interactions and/or communications with a Participant **on the CSX/Findhelp platform in the Navigation History section of the Participant's profile.**

- An example might be of when you tried to reach them, or when you met with them and what you accomplished, or when you called them and what they told you was their need was.
    - This is different than making notes on the Additional Notes portion of the Intake Form. Elements of their story should be captured there.

- This ensures there is always a record of your communication history, which will be beneficial to you and your team in serving the Participant in the future.

Make a calendar entry in the **CSX/Findhelp platform in the Follow Up Date section of the Participant's profile if warranted.**

- You may also opt to make an additional calendar entry on your own personal calendar.

Scenario 2 - Participant is required to meet with a Resource Coordinator

Preparation

Before meeting them, have your Intake Form with built-in Care Wheel either in hand or pulled up digitally so it can guide your conversation.

- Instructions for the Intake Form are located in the Assessments section, Addendums - Intake Forms.

Also, have a writing tablet nearby in case it is quicker to make handwritten notes and backfill the online Intake Form later.

*NOTE - **It is important to make eye contact and remain engaged during an in-person meeting.** Be aware of how much you work on your computer or write on a notepad while completing the Intake Form. Try to give your complete attention while listening to their story. Make some notes after your Participant has finished sharing.

Meeting

When they enter the location, or room, and approach you, standing or shaking their hand is optional, but you should:

- **Wear a smile and introduce yourself** - let them know you are glad to meet them and that they have come seeking assistance.
- **Explain that you are a volunteer and your role as a Resource Coordinator is to help them find resources.** Explain that you understand it can be challenging for people to find what they need, particularly all by themselves. You want to help people uncomplicate the search and provide a guide for them in their journey for information and solutions.
    - **NOTE:** Even though you have explained your role as a Resource Coordinator, they may still be unclear about what you do, or can do for them, or they may ask a direct question such as, "Can you help me find rent money?" In any case, explain that you are a volunteer who works with people in need to help them find what they need. You can't guarantee an outcome, but you've found that having 2 people working together is often better than someone trying to do everything on their own.
- **Mention that you don't work alone -** but as part of a team with the ____________________(organization name) they just walked into.

- **Inform them that the meeting today will take about 45 minutes** - and you'll have questions for them, and you want them to tell you more about themself and their situation.
- **Refer to the Intake Form and Care Wheel** (See Addendums section, Assessments-Intake Forms).
- **Listen actively** and paraphrase to confirm understanding. (See Addendums section-Active Listening).
- **Make notes about their story** in the Additional Notes section of the Intake Form.
- **Upon completion of the Intake Form** - thank them and explain that you have a website where you will look for resources for them. **The time for this should be built into the 45-minutes you've allotted.**

Look for resources -

- Look for resources via zip code on cityservexteam.findhelp.com
- Inform them as you go along with what you are finding, and use the platform accordingly (Referrals, Sharing, etc.)
- Keep an eye on the time.
- Try to give them at least one resource before concluding the meeting.
  - Give bite-sized pieces - one or two things at a time
    - Don't overwhelm them
    - People in crisis often can't think through more than a little at a time
- If you can't find a resource or need to locate more, assure them that you will keep looking, but do not promise that you will solve their problem.
- Emphasize that there is hope because they are not alone now, and you are going to help them find what options/resources are available.
- Encourage their resourcefulness: Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
- Goal setting: If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

Conclude the meeting

If you have met their need -

- Wind down the meeting, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions.

- Remind them they can always call 888-INFOCARE again if they need assistance in the future.
- Tell them about searching independently for resources at CityServex.help (no login required).

If you have not met their need or have more to do -

- Wind down the meeting, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Let them know you want to look into some more options/resources.
- Ask if you could schedule a time to meet again with them IN PERSON to help them find what they need. It would take about 45 minutes.
- If they are open to this, set the date, time, and confirm the location if the same or different.

If you have a meeting set -

- Thank them for trusting you and working with you.
- Ask if they have any questions.
- Let them know you'll remind them, and to PLEASE contact you if they have to cancel, so you have the opportunity to assist someone else.
- Give them your extension and how to reach you via the 888-INFOCARE line if warranted (888-463-6227).

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

If they will not schedule another meeting -

- Thank them for the opportunity to help them.
- Remind them they are always welcome to come back for assistance with resources.

Document

It's important to make brief notes of your interactions and/or communications with a Participant **on the CSX/Findhelp platform in the Navigation History section of the Participant's profile.**

- An example might be of when you tried to reach them, or when you met with them and what you accomplished, or when you called them and what they told you was their need was.
    - This is different than making notes on the Additional Notes portion of the Intake Form. Elements of their story should be captured there.

- This ensures there is always a record of your communication history, which will be beneficial to you and your team in serving the Participant in the future.

Make a calendar entry in the **CSX/Findhelp platform in the Follow Up Date section of the Participant's profile if warranted.**

- You may also opt to make an additional calendar entry on your own personal calendar.

8.6 Virtual First Meeting / Step-by-Step Guide 💻

When does this apply?

This is the first meeting with a Participant who called 888-INFOCARE or spoke with someone in person, had a brief conversation, and agreed to meet with a Resource Coordinator. They chose virtual over in-person. Plan for about 45 minutes.

Before the Meeting - Prepare

- Be in a private location with minimal distractions
- Make sure your computer has strong battery life or is plugged in
- Make sure you have a strong internet connection
- Have earbuds or headphones charged and ready
- Be familiar with your platform: mic, camera, bacground, screen share, recording, etc.
- Have an Intake Form available — digital or paper
    - Instructions in Addendums section, Assessments-Intake Forms
- Keep a writing tablet nearby for quick notes; backfill the online form later

⚠️ **Eye contact matters virtually too.** Look into the camera as much as possible, especially when the Participant is sharing their story or circumstances.

Step 1

- Start with a welcome and a smile. Let them know you are glad they've joined you online.
- Introduce yourself and your role.
- Explain that you are a volunteer Resource Coordinator here to help them find resources. Let them know finding resources alone can be challenging — you're here to uncomplicate the search and guide them.

💡 **If they ask "Can you help me find rent money?"** — Explain that you can't guarantee an outcome, but two people working together is often better than one trying to do everything alone.

- Mention that you're part of a team, not working alone.
- **Set the expectation:** the meeting will take about 45 minutes.

Step 2

- Get Verbal Consent to Record
- Let them know you will be recording the meeting. Wait for their verbal "yes" before starting the recording.

🔴 **Do not skip this step.** Verbal consent is required before recording begins.

Step 3

- Work through the Intake Form and Care Wheel together. (See Addendums section, Assessments-Intake Forms).
- Listen actively. Paraphrase to confirm understanding. (See Addendums section-Active Listening).
- Make notes about their story in the Additonal Notes section of the Intake Form.
- Check how much time is left in your 45 minutes.

Step 4

- Search cityservexteam.findhelp.com by zip code.
- Decide if you will share your screen.
    - This can be a distraction and even discouraging.
    - You may not want to share your screen, but narrate as you go.
- Pause to look at them directly when sharing information.
- Offer one or two resources at a time — don't overwhelm.
- Keep an eye on the time.
- If you can't find something, assure them you'll keep looking — do not promise to solve their problem.
- **Encourage their resourcefulness:** Ask what they've already tired, who they know, and what assets they have. Help them think creatively.
- **Goal setting:** If they're open to it and time permits, set one or two goals together in their Participant Profile.

🔀 Were their needs met today?

✓ Need Met

Conclude the meeting.

Step 5

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they joined you today.
- Ask if they have any questions.
- Let them know they can always work with a Resource Coordinator again or search independently for resources at CityServex.help (no login required).

✗ More Needed

Conclude the meeting.

- Ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions
- Schedule a 45-minute in-person, follow up meeting to keep working with them.
    - If they decline, offer another virtual meeting.
        - If they still decline, respect their decision.
            - Remind them they are always welcome to call again to schedule a meeting with a Resource Coordinator.
    - If they agree to another meeting, agree on purpose, date, time, and format.
        - Review next steps for both of you.
            - This could be work they need to do on goals set, or inquiries they need to make, agencies they need to contact, etc.
            - This could be research you will conduct, information you will gather, etc.
        - Remind them to contact you if they need to cancel.

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

Step 6

- Document brief notes in the **Navigation History** section of the CSX/Findhelp platform.
- Document elements of their story in **Additional Notes** section of the Intake Form.
- Set a **Follow Up Date** in the CSX/Findhelp platform if warranted.
    - OPTIONAL: Add a reminder to your personal calendar.

8.6.1 Virtual First Meeting / EXPANDED EDITION

This is the meeting that you set up or has been set up for you after someone has indicated they need help finding resources. They have called the 888-INFOCARE number or spoke to someone in person, and after a brief conversation, decided to make an appointment to speak with a Resource Coordinator further.

Preparation

Before your meeting begins, have all the technology you'll need ready to go and and be familiar with how to use it well. Be in a place that offers privacy for a conversation with minimal distractions.

Have the Intake Form with built-in Care Wheel either in hand or pulled up digitally so it can guide your conversation.

- Instructions for the Intake Form are located in the Addendums section, Assessments-Intake Forms.

Also, have a writing tablet nearby in case it is quicker to make handwritten notes and backfill the online Intake Form later.

*NOTE - **It is important to make eye contact and remain engaged even during a virtual meeting.** Look into the camera as much as possible, particularly when they are sharing any updates of their story or circumstances.

Meeting

When the Participant virtually arrives, you should:

- **Wear a smile and say hello** - let them know you are glad they've joined you online.
- **Let them know you will be recording the meeting.** Get their verbal consent, and RECORD THE MEETING.
- **Ask if they are comfortable with their technology**, i.e., do they know how to turn their microphone and camera on and off and share their screen with you?
  - If not, help if you can. Regardless, continue with the meeting, but consider meeting in person next time.
- **Explain that you are a volunteer and your role as a Resource Coordinator is to help them find resources.** Explain that you understand it can be challenging for people to find

what they need, particularly all by themselves. You want to help people uncomplicate the search and provide a guide for them in their journey for information and solutions.

- **NOTE:** Even though you have explained your role as a Resource Coordinator, they may still be unclear about what you do, or can do for them, or they may ask a direct question such as, "Can you help me find rent money?" In any case, explain that you are a volunteer who works with people in need to help them find what they need. You can't guarantee an outcome, but you've found that having 2 people working together is often better than someone trying to do everything on their own.

- **Mention that you don't work alone -** but as part of a team with the ______________________(organization name).
- **Inform them that the meeting today will take about 45 minutes** - and you'll have questions for them, and you want them to tell you more about themself and their situation.
- **Refer to the Intake Form and Care Wheel** (See Addendums section, Assessments-Intake Forms).
- **Listen actively** and paraphrase to confirm understanding. (See Addendums section-Active Listening).
- **Make notes about their story** in the Additional Notes section of the Intake Form.
- **Upon completion of the Intake Form** - thank them and explain that you have a website where you will look for resources for them. **The time for this should be built into the 45-minutes you've allotted.**

Look for resources -

- Look for resources via zip code on cityservexteam.findhelp.com
- Inform them as you go along with what you are finding, and use the platform accordingly (Referrals, Sharing, etc.)
    - You may or may not decide to share your screen. Remember, if you do, it can be a distraction and even discouraging depending on what you are finding.
    - Communicate as you are searching, particularly if you are not sharing your screen.
    - Pause to look at them when you do share information.
- Keep an eye on the time.
- Try to give them at least one resource before concluding the meeting.
    - Give bite-sized pieces - one or two things at a time
        - Don't overwhelm them

    - People in crisis often can't think through more than a little at a time
  - If you can't find a resource or need to locate more, assure them that you will keep looking, but do not promise that you will solve their problem.
  - Emphasize that there is hope because they are not alone now, and you are going to help them find what options/resources are available.
  - Encourage their resourcefulness: Ask what they've already tried, who they know, and what assets they have. Help them think creatively.
  - Goal setting: If they're open to it, and if time permits, set one or two goals together in their Participant Profile.

Conclude the meeting

If you have met their need -

- Wind down the meeting, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they met with you.
- Ask if they have any questions.
- Remind them they can always call 888-INFOCARE again if they need assistance in the future.
- Tell them about searching independently for resources at CityServex.help (no login required).

If you have not met their need or have more to do -

- Wind down the call, and ask: *"What can we celebrate today?"* - there is always something.
- Affirm that you are glad they reached out.
- Let them know you want to look into some more options/resources.
- Ask if you could schedule a time to meet with them IN PERSON, help them find what they need. It would take about 45 minutes.
  - If they are not open to an IN PERSON meeting, schedule another virtual meeting.

If they are open to another meeting -

- Set the date, time, and location in accordance with established guidelines.
  - If in person -
    - Refer to Guidelines for In-Person Meetings in Addendums section.
    - Mention that you will not be purchasing anything (if that is an option), and they should not either.

    - Make sure that they will not be bringing children that require supervision (if applicable).
- Ask if they have any questions.
- Thank them for trusting you and working with you.
- Let them know you'll remind them, and to PLEASE contact you if they have to cancel, so you have the opportunity to assist someone else.
- Give them your extension and how to reach you via the 888-INFOCARE line if warranted (888-463-6227).

When it occurs, refer to 8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide

If they will not schedule another meeting -

- Respect their decision.
- Thank them for the opportunity to help them.
- Remind them they are always welcome to call again to schedule a meeting with a Resource Coordinator.

Document

It's important to make brief notes of your interactions and/or communications with a Participant **on the CSX/Findhelp platform in the Navigation History section of the Participant's profile.**

- An example might be of when you tried to reach them, or when you met with them and what you accomplished, or when you called them and what they told you was their need was.
    - This is different than making notes on the Additional Notes portion of the Intake Form. Elements of their story should be captured there.

- This ensures there is always a record of your communication history, which will be beneficial to you and your team in serving the Participant in the future.

Make a calendar entry in the **CSX/Findhelp platform in the Follow Up Date section of the Participant's profile if warranted.**

- You may also opt to make an additional calendar entry on your own personal calendar.

8.7 Follow-Up Meetings to Look for Resources / Step-by-Step Visual Guide 📞🤝💻

You've made a connection with your Participant likely over the phone, or in person, or perhaps via a virtual meeting. You have already completed an initial search for resources, but needs of the Participant weren't fully met. Therefore, a follow up meeting is necessary.

These guidelines will be similar to those shared previously, but will aid you in continuing to build trust, offer encouragement, and serve well.

***NOTE - THERE IS NO EXPANDED VERSION FORMAT OF THIS SECTION, 8.7**

Before the Meeting - Prepare as Relevant to Your Situation (phone, in-person, or virtual)

- Complete research in advance - be prepared to help
- Choose a location with minimal distractions
    - Refer to Guidelines for In-Person Meetings in Addendums section
- Arrive early
- Be on time
- Have your computer open, ready and plugged in or fully charged
- Confirm a strong internet connection
- Ensure cell phone battery is charged
- Set up earbuds or headphones so your hands are free
- Be familiar with platform and using a microphone, camera, background, recording and screen sharing features
- Review notes from previous conversation
- Be ready to ask additional Intake Form questions
- Keep a writing tablet nearby for quick notes
- Review any addendums that may be helpful such as; Active Listening

⚠️ **Remember:** Eye contact matters in-person and virtually too.

Step 1

- Start the conversation with a friendly tone and sincere comments.
- Thank them for continuing to work with you on their journey.
- If applicable - let them know you will be recording the meeting. Wait for their verbal "yes" before starting the recording.

🔴 Do not skip this step. Verbal consent is required before recording begins.

🔴 Record the meeting.

Step 2

- Show care and get an update.
- Before diving into the work at hand, ask how they are doing and genuinely listen.
- Give them space to share fully. Be fully engaged — don't rush past this moment.
- Being a good listener might give you insight as to how to assist them, as well as affirm their value.

Step 3

- Review & update the Intake Form.
- Ask a few follow-up questions from the Intake Form.
- Remind them the more you know, the better you can help — and that the information also helps with reporting.

Step 4

- Review any steps you agreed to since your last meeting, i.e., inquiries made, agencies contacted, etc.
- Verify their most important need hasn't changed.
- At any point ask about the status of goals set.
    - If goals were not set, this may be the time to inquire if you can help them with this.
        - Goals are listed in this specific section of the Participant Profile.

Step 5

- Present any resources you found since your last conversation. Ask if they'd like them sent via email or text.
- Search cityservexteam.findhelp.com by zip code.
- Narrate what you're doing and pause regularly to share findings.
- There may or may not be new listings.

- It is possible too that what was not available before (bill pay for example) is now funded.
- You may have run out of time before and can complete searches during this meeting.
- Think positively and creatively.
- This meeting does not have to be the end all, but should be productive.

Step 6

Inquire About Their Community and Assets

People's strengths, relationships, and community connections are often overlooked — both by the Participant and by those trying to help them. These questions may not come naturally to ask, but they are important. Weave them into the conversation where it feels appropriate:

- *"Who is walking beside you in this journey? Who do you have in your corner?"*
    - *(If it feels comfortable) "Are you a person of faith?*
    - *Are you part of a church or faith community?"*
- *Ask if they have thought about your last conversation (if you got to it) about:*
    - *Who they know?*
    - *What assets do they have?*
        - *If you did not get to the conversation of their resourcefulness, now may be the time.*
- *Explore how they can contribute to working toward meeting their need:*
    - *What is a talent or skill they possess and possibly aren't currently using?*

These questions help you see the full picture of who they are — not just what they need.

Step 7

- Next steps will be for you to decide - based on what was accomplished in this meeting:
    - Did you provide resources for all that they need at this time?
    - Do they still have unmet needs?
    - Did they set goals you need to keep working with them on?
    - Are they going to explore options and opportunities discussed above?

- Do you have more resources you need to discover for them if possible?

Step 8

- Ask: *"What can we celebrate today?"* - there is always something.
- Ask if they have any questions.

If another meeting is needed:

- Agree on purpose, date, time, and format:
- Review next steps for both of you.
- Remind them to contact you if they need to cancel.

If another meeting is not warranted:

- Let them know they can always work again with a Resource Coordinator.
- Let them know they can search independently for resources at CityServex.help (no login required).

Step 9

- Document brief notes in the **Navigation History** section of the CSX/Findhelp platform.
- Document elements of their story in **Additional Notes** section of the Intake Form.
- Set a **Follow Up Date** in the CSX/Findhelp platform if warranted.
    - OPTIONAL: Add a reminder to your personal calendar.

Resource Coordination

ADDENDUMS

8.8 Active Listening -

Active listening is a crucial tool Resource Coordinators use to build trusting relationships with Participants. It shows Participants that what they share matters enough for you to pause and give them your full attention.

The Difference Between Hearing and Listening

There's an important distinction between hearing and listening. Hearing involves taking in the words someone says. Listening goes further—it involves processing the words, how they were said, and what they might mean.

Think of a time you read every word of a paragraph or page and then realized you hadn't actually processed any of it. With a book, you can reread. With conversation, you often don't get a second chance without risking misunderstanding or offense. Active listening requires more effort, but that effort is worth it. The way you listen can either empower someone or shut them down.

Listening Relationally, Not Transactionally

When we speak with Participants, we want to hear more than just the details of their situation. This is what makes the difference between transactional help and truly relational care.

Listen to the small details—the tone and inflection of their voice. Read between the lines and acknowledge what emotions they may be feeling. When meeting in person, notice their posture, body language, facial expressions, and the way they move as they speak.

It's natural to focus on the details of their story and shift into problem-solving mode. However, we want Participants to feel valued as people, not just as problems to solve. In practice, active listening looks like a set of simple but powerful habits.

Active Listening Techniques

Paraphrasing – One of the best ways to exercise active listening is through paraphrasing. After a Participant finishes talking, rephrase what you heard them say. This gives you both a chance to confirm you're on the same page and understand each other. It also proves to the Participant that you didn't just hear what they said but understood what they were saying. For example: *"So what I'm hearing is that you feel overwhelmed and unsure where to start. Did I get that right?"*

Verbal cues – Small verbal cues are incredibly important in making Participants feel comfortable while sharing their stories. Especially during extended periods when the Participant is explaining without interruption, verbal cues communicate that you care, are interested, are listening actively, and that the Participant should continue. This can be as simple as a gentle "mhm," "oh wow," "mm," or "ah." These cues should be subtle and never interrupt a moment of vulnerability.

Nonverbal cues – When meeting with Participants in person, show you are listening through your body language. Face the Participant. If you're taking notes, remember to look up and make eye contact regularly. Use your body language to help shape a safe and supportive environment. You can sit up and lean slightly toward the Participant to communicate attentiveness and care, or lean back to help create a relaxed and calm environment when appropriate.

ASSESSMENTS -

8.9 The Intake Form / Step-by-Step Visual Guide 📋

Example:

This is how the Intake Form appears within the cityservexteam.findhelp.com platform.

Consent to Share

To continue, I'm required to let you know that in order to help you, I do take notes that my team of other resource coordinators and other organizations will have access to. Do you want to continue our conversation knowing this?

Select an option

Personal Information

ZIP code
First Name
Last Name
Phone Number
Email Address

Best Way to Contact You

Select an option

Emergency Contact First Name:

Emergency Contact Last Name:

Emergency Contact Relationship:

Emergency Contact Phone Number:

Gender

Select an option

Primary Language Spoken

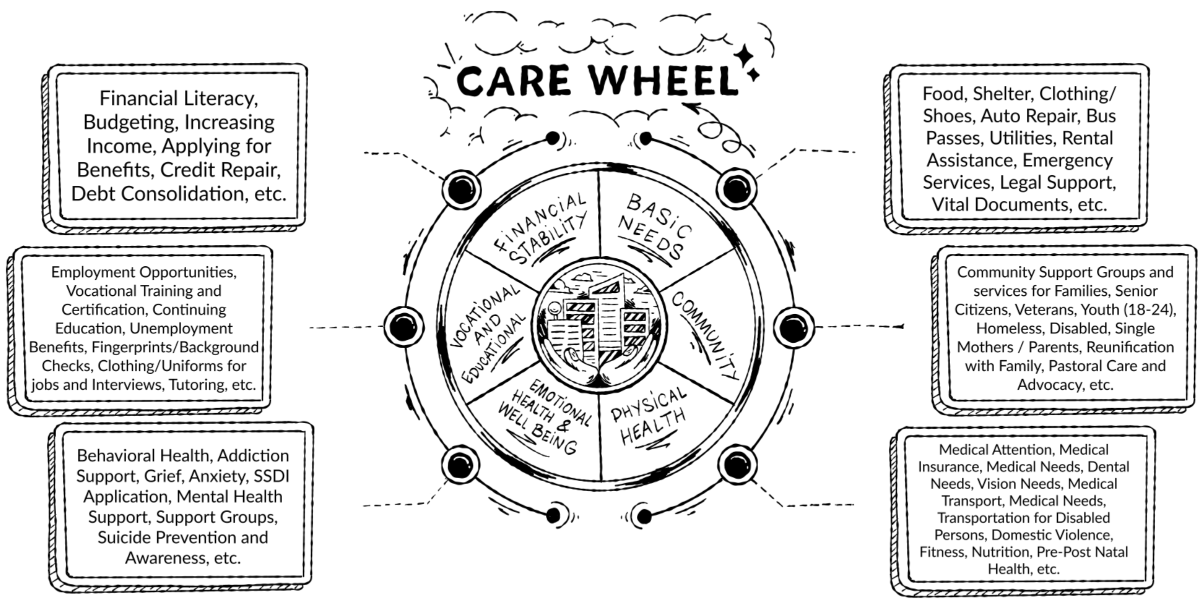
Select an option

Are you a Veteran or have a Veteran in your immediate family?

Select an option

PAUSE HERE AND ASK TO HEAR THEIR STORY.

Based on the Care Wheel, what area is the Participant expressing they need help in? (Select all that apply)



☐ Vocational
☐ Education
☐ Financial
☐ Food
☐ Housing
☐ Legal
☐ Transportation
☐ Community
☐ Physical/Medical
☐ Other

Where have you already sought help? ____________________________________

Follow-Up Date: ______________________________

Additional Notes: ____

Step 1

Set the Tone

Now that you are familiar with the layout of the Intake Form you are ready to begin.

Before asking anything, help the Participant feel safe and respected.

"These questions are personal TO you, but they are not personal FOR you. I ask everyone the same questions so I can assist them."

Also, do this:

- Reassure them their answers won't disqualify them from help
- Make sure you can pronounce their name correctly — ask if unsure

Step 2

Ask for Consent to Share Information

This is required before proceeding.

"To continue, I'm required to let you know that to help you, I do take notes that my team of other Resource Coordinators and other organizations will have access to. Do you want to continue our conversation knowing this? Yes or No."

🔀 **Do they consent?**

✓ **Yes**

Acknowledge and proceed to the required questions.

✗ **No**

Respect their decision. Offer CityServex.help for self-directed resource search. Let them know they're welcome to return anytime.

Step 3

Gather Required Contact Information

Collect at minimum:

- Zip Code (or current location if unsheltered)
- First and last name with correct spelling
- Phone number and/or email *(BOTH preferred)*

💡 Additional Intake Form questions can be asked now or filled in later through the Participant's profile.

Step 4

There is a blue bar on the Intake Form that tells you to PAUSE HERE AND ASK TO HEAR THEIR STORY.

The quality of your conversation depends on the quality of your questions. Use openers like:

"Tell me about you." | "What prompted you to contact us?" | "Tell me more about your current situation?" "Tell me about what's been going on in your life." | "What kind of resources are you hoping to find?"

⚠️ **Practice active listening throughout.** Refer to the Addendums section-Active Listening.

Step 5

Listen Fully — Make Space for Their Whole Story

When they pause, invite them to continue:

"Anything else you want me to know?" | "Is there anything else?" | "Go on if you like."

If anything is unclear, gently follow up:

- "Tell me more about..."
- "I'm not understanding — can you clarify...?" *(It's okay to ask for clarification, but not to challenge the truthfulness of their story.)*

Step 6

Thank Them, Then Paraphrase

Before moving forward, acknowledge what they shared.

"Thank you for sharing and telling me your story."

Then paraphrase to confirm understanding and accuracy:

- "I'd like to help you find what you need. Let me be sure I heard you correctly. You're looking for ________________."
- "You need ________________, is that correct?"
- "It sounds like you may be in need of ________________, is that correct?"

Step 7

Show Understanding Through Action

The Participant is watching how you respond to what they've shared. Demonstrate that you truly heard them.

- Take notes respectfully: *"I'm going to jot a few things down so I don't miss anything important."* - These notes should only be of key points and should be typed in the Additional Notes space of the Intake Form.
- Validate their experiences without judgment
- Acknowledge the challenges they've faced

Step 8

Reflect a Strength You See in Them

This is one of the most powerful things you can do. Be genuine and specific.

"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 that you are here shows you are fighting. Good for you."

Step 9

Complete the Care Wheel

Based on what you heard, check the relevant subject matter boxes on the Care Wheel. Each box will open a text field for notes. If using paper, make notes and backfill digitally later.

If there are many needs, identify the most pressing:

- List possibilities and weigh their responses
- Let them tell you what matters most right now — rent, job, childcare, etc.

Step 10

Review & Submit the Intake Form

Pause and review to make sure everything is captured.

- Note where they've already sought help — you may still recommend those resources
- Schedule a **Follow-Up Date** if appropriate (you may not be ready at this time to do this)
- Edit your responses if needed

🔴 **Click the REVIEW FORM BUTTON.**

When you are ready, check the consent box before submitting (required).

Disregard items 1 and 2 in the platform's standard language — they will not happen.

Click the SUBMIT BUTTON.

✅ Upon submission, you will receive acknowledgment that your response has been recorded.

ASSESSMENTS -

8.9.1 The Intake Form / EXPANDED EDITION

The CityServeX Intake Form gathers information that helps Resource Coordinators identify resources that Participants may qualify for and benefit from. While most fields are optional, gathering more complete information makes you more effective and helps you and CityServeX understand community needs, make informed decisions, and demonstrate impact to supporters.

REMEMBER: Your role is to help Participants feel seen and supported while gathering information needed to provide effective assistance.

Example:

This is how the Intake Form appears within the cityservexteam.findhelp.com platform.

Consent to Share

To continue, I'm required to let you know that in order to help you, I do take notes that my team of other resource coordinators and other organizations will have access to. Do you want to continue our conversation knowing this?

Select an option

Personal Information

ZIP code

First Name

Last Name

Phone Number

Email Address

Best Way to Contact You

Select an option

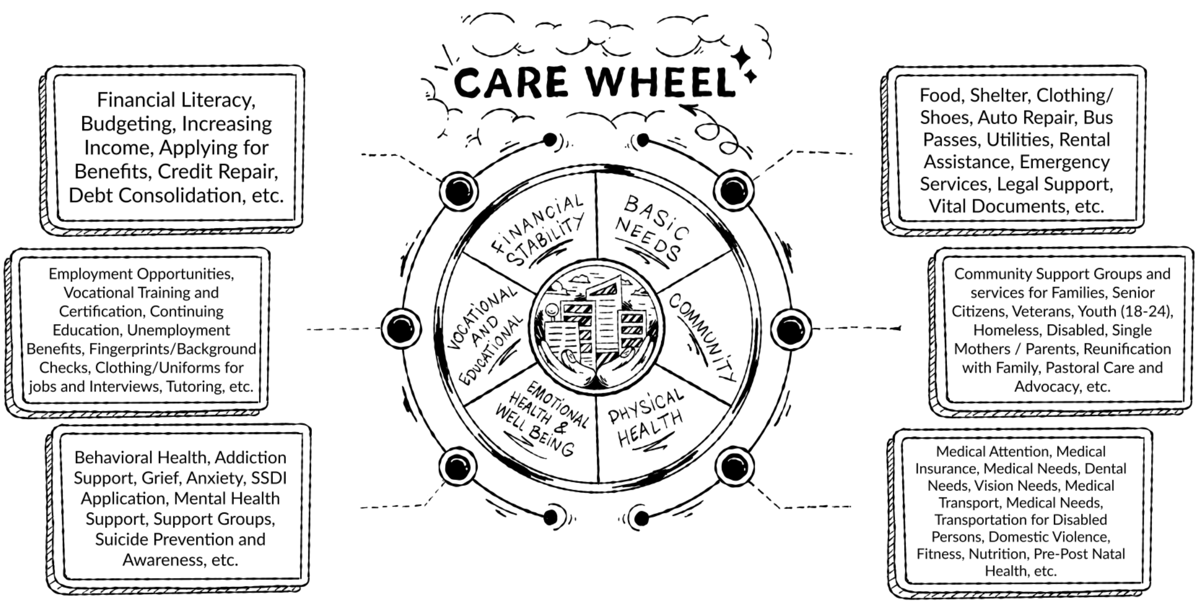
Emergency Contact First Name:
Emergency Contact Last Name:
Emergency Contact Relationship:
Emergency Contact Phone Number:

Gender
Select an option
Primary Language Spoken
Select an option

Are you a Veteran or have a Veteran in your immediate family?
Select an option

PAUSE HERE AND ASK TO HEAR THEIR STORY

Based on the Care Wheel, what area is the Participant expressing they need help in? (Select all that apply)



☐ Vocational
☐ Education
☐ Financial
☐ Food

☐ Housing
☐ Legal
☐ Transportation
☐ Community
☐ Physical/Medical
☐ Other

Where have you already sought help? ________________________________

Follow-Up Date: ___________________________

Additional Notes: ____

Guidelines for Using the Intake Form with Your Participant

Now that you are familiar with the layout of the Intake Form you are ready to begin.

Set the tone:

- Share that "These questions are personal TO you, but they are not personal FOR you. I ask everyone the same questions so I can assist them."
- Reassure them that their answers won't disqualify them from receiving help.
- Make sure you know how to pronounce their name correctly—ask if you're unsure.

Ask for Consent to Share Information - This is located at the top of the Intake Form and must be read and answered. It reads: *"To continue, I'm required to let you know that to help you, I do take notes that my team of other Resource Coordinators and other organizations will have access to. Do you want to continue our conversation knowing this? Yes or No."*

- If yes — acknowledge and proceed.
- If no — let them know you are not able to assist them without sharing information, but you respect their decision. Offer them the website CityServex.help, where they can search for resources on their own. Let them know they are always welcome to contact CityServeX **or** ________________________ (organization name) in the future if they decide they would like to work with a Resource Coordinator.

If you proceed collect at a minimum the following information:

- Zip Code of where they reside, or are currently located if unsheltered
- First and last name with correct spelling
- Phone number and/or email address *(BOTH preferred)*

There are additional questions on the Intake Form that you may choose to ask now or during a later conversation. If later, you can access blank fields through the Personal Information section of the Participant's profile, where additional questions also become available.

There is a blue bar on the Intake Form that tells you to PAUSE HERE AND ASK TO HEAR THEIR STORY.

The quality of your conversation depends on the quality of your questions. Use openers like:

"Tell me about you." | "What prompted you to contact us?" | "Tell me more about your current situation?" "Tell me about what's been going on in your life." | "What kind of resources are you hoping to find?"

Practice active listening throughout. *(Refer to the Addendums section-Active Listening.)*

Listen and make space for their whole story -

Once they begin sharing, give them space to speak fully.

- When they pause, invite them to continue with:
  - *"Anything else you want me to know?"*
  - *"Is there anything else?"*
  - *"Go on if you like."*
- If any pieces are unclear or incomplete, gently follow up:
  - *"Tell me more about..."*
  - *"I'm not understanding — can you clarify...?" (It's okay to ask for clarification, but not to challenge the truthfulness of their story.)*
- When they have finished sharing, thank them before moving to paraphrasing:
  - *"Thank you for sharing and telling me your story."*

Paraphrase to Confirm Understanding and Accuracy -

Paraphrasing shows the Participant that you didn't just hear them — you understood them. It may sound like:

- *"I'd like to help you find the resource you need. Let me be sure I heard you correctly. You're looking for _______________."*
- *"You need _______________, is that correct?"*
- *"It sounds like you may be in need of _______________, is that correct?"*

(Refer to the paragraph on paraphrasing in the Active Listening Addendum.)

Show Understanding Through Action -

As you work through the Intake Form, the Participant is watching how you respond to what they've shared. Demonstrate that you truly heard them:

- Take notes respectfully, and let them know why: *"I'm going to jot a few things down so I don't miss anything important."*
    - These notes should only be of key points and should be typed in the Additional Notes space of the Intake Form.
- Validate their experiences without judgment.
- Acknowledge the challenges they've faced.

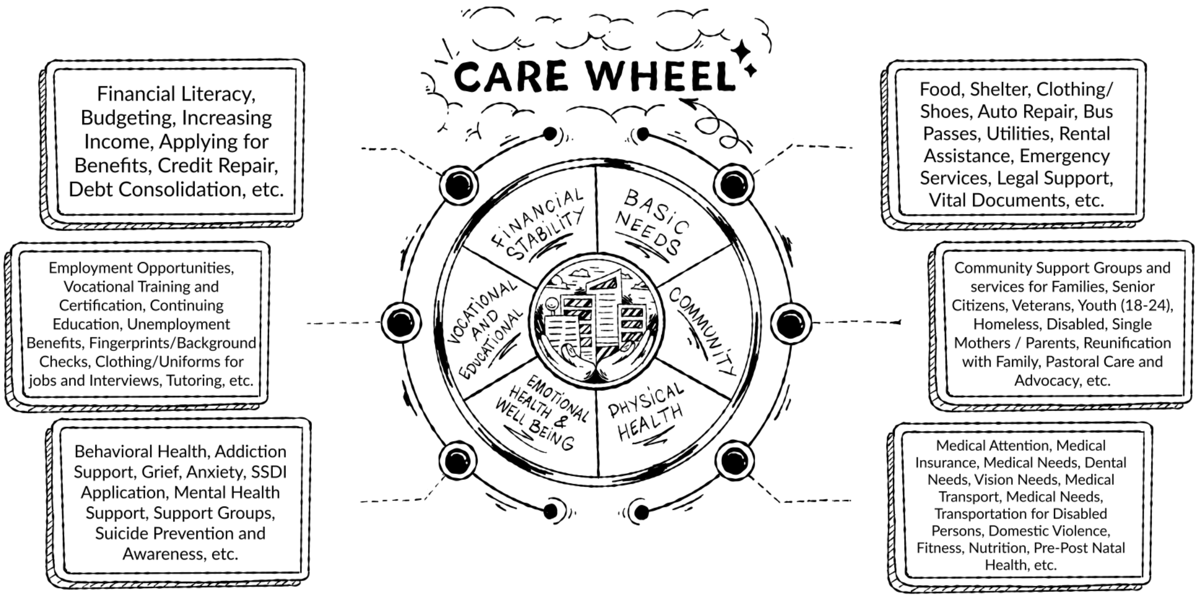
Reflect a Strength You See in Them -

After listening to their story, take a moment to acknowledge something genuine and specific that you observed. This is one of the most powerful things you can do. Examples:

- *"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 that you are here shows you are fighting. Good for you."*

The Care Wheel -

- Based on what you heard, check the relevant subject matter boxes on the Care Wheel.
    - As you check a subject matter box under the Care Wheel, it will open up a text box for notes.
    - If you are not using the online Intake Form initially, make notes and backfill this information later - just as you would any other recorded information.



- If it is clear what the Participant needs help with, verify what the most pressing matter is (especially in circumstances when there are many needs)
  - List off possibilities and weigh their responses to identify what is important to them and what they want to address, i.e., look for a better job, come up with rent $, locate after-school care, and so on.

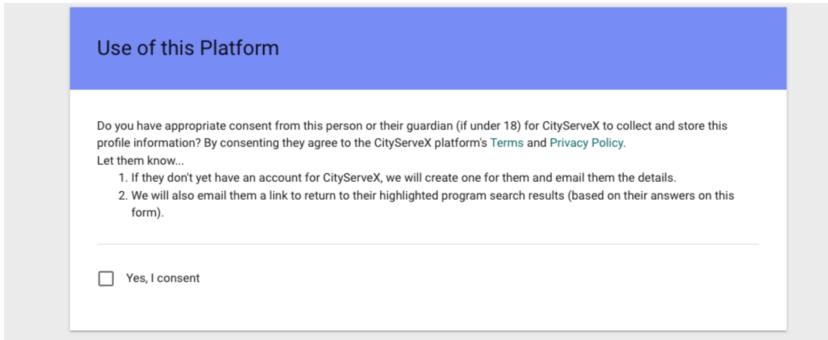
Review & Submit the Intake Form -

Pause and review to make sure you've captured everything:

- Note where they've already sought help — you may still recommend those resources.
- Schedule a **Follow-Up Date** if appropriate - you may not be ready at this time to do this
- Edit your responses if needed

Click the REVIEW BUTTON.

- This box will appear:



Use of this Platform

Do you have appropriate consent from this person or their guardian (if under 18) for CityServeX to collect and store this profile information? By consenting they agree to the CityServeX platform's Terms and Privacy Policy.
Let them know...

1. If they don't yet have an account for CityServeX, we will create one for them and email them the details.
2. We will also email them a link to return to their highlighted program search results (based on their answers on this form).

☐ Yes, I consent

This is standard language, but 1. and 2. will not happen. You must check the consent box.

Click the SUBMIT BUTTON.

- Upon submission, you will receive acknowledgment that your response has been recorded.

8.10 Connecting Participants to Resource Coordinators

Participants are not assigned to Resource Coordinators. Participants that have left a message for assistance with resources may be contacted by any available Resource Coordinator.

When someone calls CityServeX and leaves a message for assistance with resources it is the Care Champion that creates an Inquiry Form.

This Inquiry Form generates the Participant's Name being listed on the People I'm Helping dashboard of the CityServeXTeam.findhelp.com site.

Any Resource Coordinator may contact a Participant, regardless of gender.

The CSX voicemail states that Participants will receive a return call within 1 business day, so it is important that the next available RC tries to make contact.

The Process -

1. A Participant calls CityServeX and leaves a message
2. The Care Champion receives the message and creates an Inquiry Form
3. Inquiry Forms generate Participant Profiles
4. Participant names are located in the People I'm Helping dashboard of the CityServeXTeam.findhelp.com site
5. The Care Champion flags the newly generated Participant name
6. Resource Coordinators review the People I'm Helping dashboard of the CityServeXTeam.findhelp.com site for unassigned and flagged Participants
7. Resource Coordinators open up the profile of any unassigned and flagged Parcipants and reads the Navigation History
8. Resource Coordinators attempt to contact Participants that have not be successfully contacted
    a. No attempt was made.
    b. Attempt was unsuccessful.
9. Resource Coordinators note in the Participant's Navigation History their attempt to make contact by phone or email

If contact was made -

- Resource Coordinators should assign the Participant themself and unflag.

If no contact was made -

- Participant Profiles remain unassigned and flagged

Resource Coordinators Unavailable: It is the responsibility of the Care Champion to monitor the People I'm Helping dashboard of the CityServeXTeam.findhelp.com site. If a Resource Coordinator is not available to return a call within 1 business day, the Care Champion returns the initial call and makes notes accordingly.

Temporary Coverage for Ongoing Relationships

Sometimes, a Resource Coordinator who has been working with a Participant needs to step away temporarily—for vacation, family leave, or other reasons. In these situations, the Care Champion may assign another RC to provide coverage. This ensures Participants continue receiving consistent support even when their primary RC is unavailable. The covering RC handles follow-up calls and meetings until the original RC returns, maintaining continuity of care during the transition.

8.11 "Bless and Release" - When a Match isn't Working

CityServeX is built on the belief that strong, trusting relationships are essential to helping Participants move from crisis to stability. Most of the time, Resource Coordinators and Participants work together successfully. However, there are rare occasions when a different match might serve everyone better.

When an RC Needs to Step Back

If a Resource Coordinator feels they cannot be helpful to a Participant, or if they're uncomfortable in the relationship for any reason, they should talk with the Care Champion. Together, they can:

- Explore what's creating the challenge
- Develop strategies to improve the relationship, if possible
- Determine whether transitioning the Participant to another RC is the best path forward

This should happen **very rarely**. We encourage Resource Coordinators to work through challenges when possible, as building trust often requires patience and persistence. However, we also recognize that sometimes a different match truly serves the Participant better.

When a Participant Requests a Change

Participants can ask to work with a different Resource Coordinator at any time, and this is completely acceptable. We want Participants to feel comfortable and supported. If a Participant makes this request:

- Honor it without judgment
- Work with the Care Champion to facilitate a smooth transition
- Document the change appropriately in the system

The Spirit of "Bless and Release"

Whether initiated by the RC or the Participant, ending or transitioning a relationship should be done with grace and respect. "Bless and release" means:

- Acknowledging the value of the time spent together
- Wishing the Participant well in their journey
- Ensuring they're connected with continued support
- Releasing the relationship without blame or defensiveness

The goal is always to serve Participants well—and sometimes that means recognizing when someone else might serve them better.

8.12 Guidelines for Email Communications with Participants

CityServeX provides all Resource Coordinators with a personalized CityServeX email account. This account should be used **exclusively** for all Resource Coordination work — never use a personal email account for participant communication. Email can be an effective way to connect with participants, especially when phone calls aren't possible or when checking in between meetings. However, email communication requires consistent attention and thoughtful practices to serve participants well.

When to Use Email

- **Initial introduction** – When a participant has left a message requesting services, but phone contact hasn't been successful
- **Follow-up and check-ins** – Staying connected between phone calls or meetings
- **Sharing resources** – Sending links, documents, or information discussed in previous conversations
- **Scheduling** – Confirming appointments or suggesting meeting times

---

Writing Introduction Emails

When introducing yourself to a new participant via email:

Subject line: Keep it clear and welcoming

> Example: "CityServeX or ___________________________ (organization name) Resource Coordinator - [Your Name]"

Opening:

- Acknowledge their outreach: *"Thank you for reaching out to CityServeX or ___________________________ (organization name) on our 888-INFOCARE line."*
- Introduce yourself warmly: *"My name is [First Name], and I'm a Resource Coordinator with CityServeX or ___________________________ (organization name)."*

Body:

- Briefly explain your role: *"I'm here to help you find resources and navigate services in our community."*
- Offer to connect: *"I'd like to schedule a call with you to get started."*
- Include your availability: *"I'm typically available [days/times]. Feel free to reply to this email and let me know when we could schedule a call."*
- Offer an option: *"If my schedule doesn't work for you, let me know when you would be available, and I can have another Resource Coordinator on our team call you."*

Closing:

- Express genuine interest: *"I'm looking forward to hearing from you and learning how I can help."*
- Sign with warmth: *"Take care, Sincerely, Blessings, In Service, (your choice), and then [Your Name]."*

Example Introduction Email:

> **Subject:** CityServeX Resource Coordinator - Sarah
>
> Hi [Participant Name],
>
> Thank you for reaching out to CityServeX through our 888-INFOCARE line. My name is Sarah, and I'm a Resource Coordinator here.
>
> I received your message and would like to connect with you to learn more about what you're looking for and how I might be able to help. I work with people in our community to find resources and navigate services that can make a difference.
>
> I'd like to schedule a phone call to get started. I'm typically available Tuesdays and Thursdays between 10am–3pm. Please reply to this email and let me know if we could talk during that time frame, and on which day.
>
> If my schedule doesn't work for you, let me know when you would be available, and I can have another Resource Coordinator on our team call you.
>
> I'm looking forward to hearing from you.
>
> Take care, Sarah

Writing Follow-Up and Check-In Emails

When checking in with participants you're already working with:

- **Be personal** – Reference something specific from your last conversation
- **Keep it brief** – Respect their time
- **Ask open-ended questions** – *"How have things been going?"* rather than yes/no questions
- **Offer specific help** – *"I wanted to check in about the housing application we discussed."*
- **Include next steps** – Make it easy for them to respond or take action

Example Check-In Email:

> **Subject:** Checking In – Resource Coordinator Sarah
>
> Hi [Name],
>
> I wanted to check in. How did things go with the [agency] I referred you to?
>
> I'm also wondering if you were able to gather those documents we talked about for the assistance application. Let me know if you need any help with that — I'm happy to walk through it together.
>
> Hope you're doing well. Feel free to reply to this email, or you can leave a message at (provide number and your extension).
>
> In Service, Sarah

Email Response Expectations

If you use email with participants, you must:

- **Respond promptly** – Reply to participant emails within one business day whenever possible
- **Check your CityServeX email regularly** – At least daily during the days you're volunteering
- **Set realistic expectations** – If you won't be checking email for a period of time, notify your participants and arrange coverage through your Care Champion

When You're Away or Unavailable

If you will be unavailable to check your email for an extended period:

- Contact your Care Champion in advance to arrange coverage
- Let your Care Champion know which participants may need follow-up during your absence
- If possible, send participants a brief heads-up that another RC may be in touch

Managing Your Email

Create a folder for each participant to keep all correspondence organized and easily accessible. This helps you:

- Track the conversation history
- Reference previous discussions quickly
- Maintain continuity if another RC needs to provide coverage

NOTE - Keep a record of emails sent on the CSX/Findhelp platform in the Navigation History section of the Participant's Profile. Example: *"Emailed 3.6.26 to check in and see how he is doing."

This ensures there is always a complete picture of your communication history, even if another RC needs to step in.

Do not delete participant emails. Keeping complete records:

- Serves both you and the participant
- Provides context if you need to transition their care
- Helps document your work and their progress

Email Best Practices

- **Use professional but warm language** – You're friendly, not formal
- **Proofread before sending** – Errors can undermine trust
- **Respect privacy** – Never include sensitive information that could be compromised if forwarded

- **Be mindful of tone** – Email can be misinterpreted; when in doubt, call or text
- **Don't overuse email** – Complex or sensitive conversations are better handled by phone or in person
- **Set boundaries** – You don't need to respond immediately at all hours, but do respond consistently during your volunteer times

---

When Email Isn't Working

If a participant stops responding to emails:

1. Try calling or texting
2. Send one more email acknowledging the silence: *"I haven't heard from you in a while and want to make sure you're okay. I'm here whenever you're ready to reconnect."*
3. Don't take it personally — people in crisis often withdraw
4. Document your attempts to reach them

Special Considerations

Contact your **Care Champion immediately** if:

- A participant shares something urgent or concerning via email
- You receive an angry or upset email
- Communication becomes inappropriate

8.13 Guidelines for In-Person Meetings

Choosing a Meeting Location

Select locations that balance accessibility, safety, and privacy:

- Public settings with private spaces - Coffee shops with quiet corners, library study rooms, community centers with meeting areas
- Neutral ground - Choose locations that feel welcoming and non-intimidating
- Accessible - Consider transportation access, parking, and physical accessibility needs
- Appropriate for conversation - Quiet enough to hear each other and discuss sensitive topics

Safety Considerations

For you:

- Meet in public places
- Let your Care Champion know where you'll be and when you expect to finish
- Trust your instincts—if something feels unsafe, reschedule or suggest a different location
- Keep your phone charged and accessible
- Position yourself near exits when possible
- Follow additional guidelines outlined in the CityServeX document entitled "Safety First."

For your participant:

- Choose locations where they won't run into people they know when discussing sensitive matters
- Offer to meet somewhere convenient to them

Creating a Comfortable Environment

- Arrive early to secure a quiet spot and get settled
- Don't purchase anything for yourself or your Participant unless it's a low cost, non alcoholic beverage
- Sit at an angle rather than directly across from each other—it feels less confrontational
- Minimize distractions - Silence your phone and close your laptop when listening
- Be mindful of body language - Maintain an open, relaxed posture
- Offer water if it is available at no cost and easily accessible
- Respect their space - Don't sit too close; let them choose their comfort level

During the Meeting

- Start with connection, not forms - A few minutes of genuine conversation before diving into "paperwork."
- Explain that you'll use your laptop or tablet to take some notes so you can remember everything.
- Take breaks if needed - Especially for longer meetings or difficult topics
- Watch for signs of distress - Be prepared to pause, offer support, or reschedule if needed

Boundaries and Professionalism

- Maintain appropriate boundaries - friendly but professional
- Do not give money to the Participant under any circumstances
- Avoid personal disclosure that shifts focus away from the Participant
- Don't exchange personal contact information - Keep communication through the provided channels
- End meetings gracefully - Be clear about next steps and when you'll follow up

Special Circumstances

- If they want to bring someone, generally encourage this if it provides support.
- If they have to bring children that will need supervision, reschedule the meeting.
- If they miss the meeting, follow up with compassion; crises happen.

Daily Operations — Comprehension Questionnaire

This section contains a lot of information, and while practical experience will make it more and more familiar, we want to invite you to pause and reflect on what you've read before moving forward.

The following questionnaire covers Resource Coordinator guidelines, meeting formats, the Intake Form, documentation, and more. Some questions have a single correct answer; others simply ask for your best understanding or your own words. There are no trick questions — just an opportunity to see what's landing and what might need a second look.

Use the link provided to complete and submit your answers. Answer all questions to the best of your ability based on what you read in Section 8. Your participation helps **CityServeX** understand how well our materials are serving you and where we can improve.

Thank you for taking the time — it matters!

Part 1 — Multiple Choice (Questions 1–10)

1. Which of the following best describes the role of a Resource Coordinator?

A. To make decisions on behalf of Participants
B. To bridge the gap between crisis and stability by connecting people to resources
C. To guarantee outcomes and solve Participants' problems
D. To serve as the Participant's primary counselor

2. According to Section 8.1, which of the following is NOT one of CityServeX's four core values?

A. Stories — People Over Process
B. Empathy — Emotional Connection
C. Efficiency — Getting Results Quickly
D. Creativity — Connecting the Dots

3. When returning a phone call and the Participant does not answer, you should:

A. Close their profile and move on
B. Leave a voicemail identifying yourself and the 888-INFOCARE line, and let them know you or another team member will try again
C. Send an email immediately
D. Wait for them to call back on their own

4. How long should a typical first phone call with a Participant take?
   - A. 15 minutes
   - B. 30 minutes for the Intake Form; no more than 45 minutes total
   - C. As long as it takes — there is no time limit
   - D. 60 minutes

5. Before starting a recording during a virtual meeting, the RC must:
   - A. Notify the Care Champion
   - B. Obtain the Participant's verbal consent and wait for their verbal "yes"
   - C. Begin recording immediately to capture everything from the start
   - D. Only record if the meeting is longer than 30 minutes

6. When searching for resources on cityservexteam.findhelp.com, you should search by:
   - A. The Participant's name
   - B. Their primary need
   - C. Zip code
   - D. Their income level

7. Which statement best reflects CityServeX's approach to faith-based conversations outside a faith community setting?
   - A. RCs should not discuss faith under any circumstances
   - B. RCs may respond if the Participant initiates the topic, and may offer to pray at the end — only after addressing immediate needs
   - C. RCs should invite Participants to their personal church
   - D. RCs should open every meeting with prayer

8. What should happen after every meeting, regardless of outcome?
   - A. Submit a detailed report to CityServeX headquarters
   - B. Document brief notes in the Navigation History section of the Participant's profile in the CSX/Findhelp platform
   - C. Call the Care Champion with a verbal update
   - D. Email the Participant a summary of the meeting

8. What is the purpose of the "Bless and Release" guideline?
   - A. To permanently close a Participant's case after their needs are met
   - B. To remove inactive Participants from the platform
   - C. To transition a Participant to a different RC gracefully and respectfully when a match isn't working
   - D. To end a volunteer's service with CityServeX

10. According to section 8.10, who is responsible for creating the Inquiry Form when a Participant leaves a message?

   A. The first available Resource Coordinator
   B. The Care Champion
   C. The Participant themselves via the website
   D. Any team member who picks up the voicemail

Part 2 — True or False (Questions 11–18)

11. Participants are assigned to specific Resource Coordinators and may only work with that RC.

   True / False

12. A Resource Coordinator should offer one or two resources at a time to avoid overwhelming the Participant.

   True / False

13. It is acceptable to use your personal email account to communicate with Participants when your CityServeX email isn't working.

   True / False

14. The Consent to Share section of the Intake Form is required before proceeding with gathering information.

   True / False

15. If a Participant declines to schedule a follow-up meeting, the RC should continue to push for a meeting until the Participant agrees.

   True / False

16. The Follow-Up Meetings section (8.7) has a separate Expanded Version format, just like sections 8.4, 8.5, and 8.6.

   True / False

17. Hearing and listening are the same thing when it comes to resource coordination.

   True / False

18. When meeting with a Participant in person, it is helpful to ask what they have already tried and what assets they have.

   True / False

Part 3 — Fill in the Blank (Questions 19–24)

19. Before asking any questions on the Intake Form, the RC should help the Participant feel safe by saying: "These questions are personal _______ you, but they are not personal _______ you."

20. The CityServeX voicemail promises Participants a return call within _______ business day(s).

21. At the conclusion of every meeting — whether needs were fully met or not — the RC should ask: "_______?"

22. According to section 8.1, an RC is a guide, not a _______. Their role is to illuminate pathways and present options.

23. Resource Coordinators are reminded not to promise to _______ their Participant's problem, but to assure them that they will keep looking.

24. The blue bar on the Intake Form instructs the RC to: "PAUSE HERE AND ASK TO _______."

Part 4 — Short Answer (Questions 25–30)

25. Describe two things an RC should do before making a phone call to a Participant. Why do you think these steps matter?

____
____

26. In your own words, what is the difference between "hearing" and "listening" as described in section 8.8? Why does this distinction matter in resource coordination?

____
____
____
____

27. What are two ways an RC can encourage a Participant's resourcefulness during a meeting? Why is this important to the CityServeX approach?

____
____

28. Imagine a Participant's needs were not fully met in the first meeting. Walk through what you would do to close the meeting well and set up a follow-up.

____
____

----

29. Why does **CityServeX** use the phrase "Bless and Release"? What values does this approach reflect?

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30. Section 8.1 says, "Resource Coordinators don't promise solutions, but believe that the situation is promising." What does this mean to you, and how would you put it into practice?

👉 Click here to submit your responses