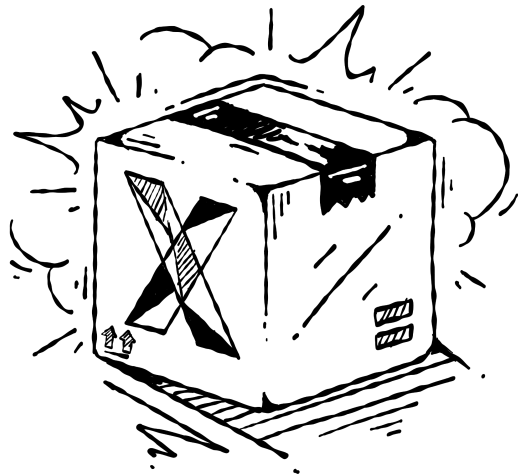




CityServeX "Box"

Resource Coordinator Manual

Resource Directory Platforms

NeighborLink - Individual to Another

Section 07



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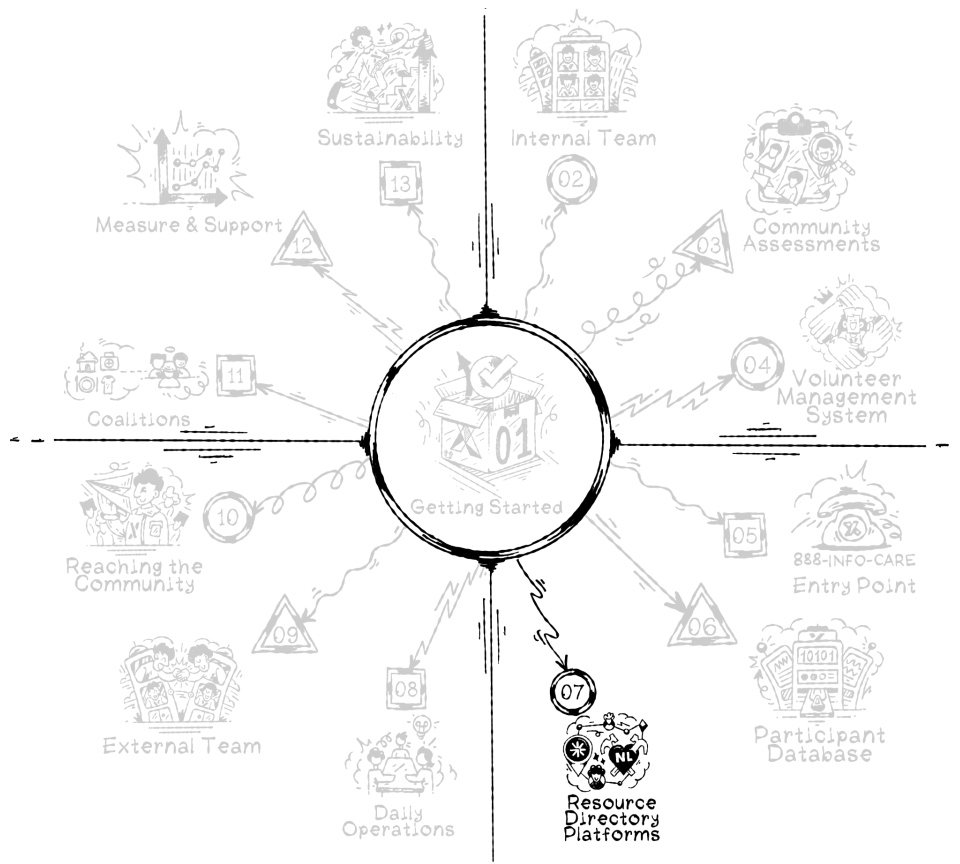
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07: Resource Directory Platforms

NeighborLink - Individual to Another





NeighborLink: CityServeX Site Onboarding

Small things **change** neighborhoods.

NeighborLink Overview Kit

7.0 For a thorough overview of all that NeighborLink brings, please start here:

[NeighborLink: Overview Kit](#)

Want To Go Deeper?

- Executive summary: <https://www.neighborlink.org/executive-summary>
- Overview kit and table of contents pointing to other assets:
<https://www.neighborlink.org/overview>
- Slide deck: <https://www.neighborlink.org/slides>
- In-depth strategy/vision/roadmap: <https://www.neighborlink.org/vision> • A recent video series we launched, highlighting a variety of individual and group volunteers:
<https://www.youtube.com/playlist?list=PLhyEHT7sTKRcG6b1la8C-tPcbO9qz8jN2>
- Impact stories, submitted directly by volunteers:
<https://www.neighborlink.org/stories/?all=true>

DEFINITIONS

- **Area Steward:** Synonymous with **CSX Sites**. NeighborLink's local champions that help steward a city or region.



NeighborLink





What is NeighborLink?

7.1 Many needs don't require a program. They require a neighbor.

In communities across the country, increasing red tape and widening resource gaps have left many everyday needs unmet. Many are smaller but significant requests: leaking faucets, handrails, lightbulb replacements, yardwork, painting, errands, car brake pads, cleaning, etc. They are **neighbor-sized** challenges – problems that are tough to solve with intervention by large systems. Yet they are too important to ignore, since small repairs often determine safety and confidence for a household.

At the same time, we continue to see a growing desire among groups and individuals to live out their faith in meaningful, practical ways. Often, they face administrative, liability, technical, training, and support barriers that make serving difficult. Even finding neighbors who need help can be a challenge. The honest reality: this type of direct service can be hard and messy.

We sit at the intersection of these realities, serving as connective infrastructure within a broader ecosystem of care. Using our 25 years of service and learning, we help translate compassion into consistent, organized action while strengthening a community's collective capacity to care for one another.

NeighborLink enables people to live out their faith through practical acts of neighboring. We make neighbor-sized projects discoverable, reduce barriers and burdens, and give away ongoing support and guidance. Our goal: to free up groups and individuals to serve others well and experience transformation. Together, we join the ongoing work of Jesus, translating everyday compassion into lasting community.





CityServeX + NeighborLink

7.2 The partnership between **CityServeX** and NeighborLink exists because both missions align: to uncomplicate and humanize social services.

NeighborLink aims to simply provide an additional spoke in the hub of services, meeting everyday needs that slip through the cracks of other systems using a grassroots network of neighbors. Think of NeighborLink as a safety net.

Note that when a participant's zip code falls outside your CSX Site's service area, NeighborLink is positioned as the default, wide-net resource. Nobody gets turned away empty-handed.

WHEN TO USE NEIGHBORLINK

Use NeighborLink when:	Use FindHelp when:
Practical, neighbor-sized needs: leaking faucets, handrails, burned out lights, yardwork, painting, errands, car brake pads, cleaning, etc.	Formal social services: food, housing, healthcare, utilities, benefits navigation
Need falls outside what the traditional nonprofit or government system typically addresses	Multi-system need requiring Resource Coordinator to walk alongside over time
No case management, eligibility screening, or formal documentation required	Eligibility screening, documentation, or program enrollment required





Roles

7.3 Sites are primarily responsible for three things: submitting client projects through NeighborLink when appropriate, providing general oversight, and helping get the word out to possible referral partners and volunteer groups. The aim is to not be a burden – NeighborLink is designed to be frictionless. If you do nothing other than submit projects and help get the word out, that's still **neighboring**.

Resource Coordinators run the day-to-day submissions.

Community Advocates build the volunteer network.

The **Care Champion** sets up the foundation that makes both possible and oversees the platform's health.

CARE CHAMPION

7.3a The Care Champion is the **Area Steward**, NeighborLink's primary local point of contact for the **CSX Site**.

Initial Responsibilities

1. Attend a 2 hour NeighborLink training session with the NeighborLink team and your CityServeX Liaison.
2. Complete your site's onboarding by submitting all required [onboarding information](#) to your CityServeX Liaison so NeighborLink can launch your area.
3. Register as a volunteer at neighborlink.org/volunteer and the NeighborLink team will convert your account to an admin. Every admin must complete this step – no exceptions. Feel free to skip the background check step!
4. Identify all other admin users to your CityServeX Liaison after they have registered as volunteers at neighborlink.org/volunteer.
5. Submit a test project, experiment with the map and search, lead and edit the test project, etc. – get hands-on with the platform in general. (The NeighborLink team will delete test data after the fact!)
6. OPTIONAL: Request and attend follow-up meetings with the NeighborLink team, as needed. Ask clarifying questions, identify unique circumstances, and brainstorm solutions.
7. Lead a 1-2 hour NeighborLink training session with your RCs and the NeighborLink team before going live.



Ongoing Responsibilities

1. Ongoing training and support of RCs and their usage of NeighborLink.
2. Ensuring every RC understands when NeighborLink is appropriate to use within a participant interaction.
3. Create and oversee a process for how to leverage NeighborLink that fits within your site's unique circumstances (we can help!).
4. Oversee the project queue – triage, edit, approve, edit, and scope submitted projects. Stale or poorly scoped projects reduce the volunteer experience and the platform's effectiveness.
5. Manage seasonal bulk actions (ex: mass-expire all snow removal projects after the winter ends).
6. Attend a monthly Zoom with CityServeX and NeighborLink leadership.
7. Route all site support through CityServeX – never contact NeighborLink directly.

RESOURCE COORDINATOR

7.3b The Resource Coordinator is the day-to-day operator of NeighborLink at the site level. You hear the need, decide which lane it belongs in, submit the project, support its lifecycle, and close the loop. The Care Champion oversees the system. You run it.

NeighborLink has 18,000+ completed projects. 7,500+ homeowners served. 3,500+ volunteers mobilized across 31 states. Every single one of those started with someone who heard a need and decided to enter it. That's your role. Hear the need. Know the lane. Submit the project. Follow up. Tell the story.

NeighborLink is accessible directly at neighborlink.org or through FindHelp – the same platform you already use for resource coordination. You do not have to leave your familiar workflow to enter a NeighborLink project.

Initial Responsibilities

1. Attend a NeighborLink training session with your Care Champion and the NeighborLink team.
2. Register as a volunteer at neighborlink.org/volunteer and the NeighborLink team will convert your account to an admin. Every admin must complete this step – no exceptions. Feel free to skip the background check step!
3. Notify your Care Champion that you have registered so they can include you in the admin



user request to NeighborLink.

4. Submit a test project, experiment with the map and search, lead and edit the test project, etc. – get hands-on with the platform in general. (The NeighborLink team will delete test data after the fact!)

Ongoing Responsibilities

1. Determine the right tool for a participant request: FindHelp vs. NeighborLink? 2. Submit projects on behalf of participants whose needs qualify. Document in the CSX CMS first.
3. Help capture project recaps when needs are met – these are the stories that inspire the next volunteer. With permission, capture brief written accounts from neighbors who received help.
4. Escalate all platform questions to your Care Champion. Never contact NeighborLink directly.

COMMUNITY ADVOCATE

Across the country, a spirit of compassion is reawakening. Renewed conversations about Jesus, grace, and generosity are growing. Groups and individuals want to live out their faith in tangible ways. But for many people, the next step is still unclear and burdensome. NeighborLink provides a simple path forward.

As a Community Advocate, you exist at the intersection of two realities: people who want to help but don't know how to start, and neighbors who have a need that no program addresses. Your job is to help close that gap – on both sides.

Initial Responsibilities

1. Attend a 2 hour NeighborLink training session with the NeighborLink team and your CityServeX Liaison..
2. Register as a volunteer at neighborlink.org/volunteer and the NeighborLink team will convert your account to an admin. Every admin must complete this step – no exceptions. Feel free to skip the background check step!
3. Submit a test project, experiment with the map and search, lead and edit the test project, etc. – get hands-on with the platform in general. (The NeighborLink team will delete test data after the fact!)
4. Go through NeighborLink's deeper materials and Knowledge Base articles. 5. OPTIONAL:





Request and attend follow-up meetings with the NeighborLink team, as needed. Ask clarifying questions, identify unique circumstances, and brainstorm solutions.

Ongoing Responsibilities

You do not need to be the platform operator. You are the reason the platform has anything to operate.

1. Volunteer pipeline: recruiting individuals, groups, churches, businesses, and organizations to learn more about NeighborLink and register as volunteers in your area.
2. Neighbor awareness: making sure community members who have practical, neighbor-sized needs know they can submit a project – by calling 888-INFO-CARE, visiting neighborlink.org, or texting.
3. Promote NeighborLink across all four CSX lanes: faith, business, government, nonprofit.
4. Make local connections and partner with the NeighborLink team to present, onboard, and train new groups.
5. Work closely with the NeighborLink team, advocating for necessary changes, new materials, and common themes emerging from conversations.

Training

START HERE

7b.4 Then, take an initial look through our [Knowledge Base](#) articles. In particular, articles covering the Steward Experience, Homeowner Experience, and Volunteer Experience will be helpful. *NOTE: The KB is currently a set of in-depth, bare-content articles. These will soon be worked into a training curriculum, but we're sharing the raw format sooner rather than later.*

1:1 Training

NeighborLink provides 1:1 training to each new **CSX Site**, custom tailored to each role. Usually, **you can expect a 2-hour meeting to cover all of it**, including time for web platform demonstrations, Q&A, and concerns/risks. NeighborLink bends over backwards to be intuitive, accessible, and (whenever possible) self-explanatory – for a wide variety of user demographics. But training is not capped to that window and we're directly accessible for additional meetings and ongoing, direct support!



TOPIC	CC	RC	CA
How to access NeighborLink and log in. Desktop vs. tablet vs. mobile experience.	YES	YES	YES
Your own user profile and notifications.	YES	YES	YES
Neighbor (client) search and profiles.	YES	YES	YES
Project Intake: submitting on behalf of a client; client self-submitting; submission through text messaging; cloning an existing project.	YES	YES	YES
Project intake queue.	YES		
Project discovery: map; search; saved searches; exports; bulk actions); project notification subscriptions.	YES	BASIC	YES
Project page and edit project page: details and project history; photos and files, lifecycle of stages; leader vs. additional volunteers; liability waivers; internal notes.	YES	BASIC	YES
Project recap: capturing stories and stats.	BASIC		YES
Advanced ops: group processes; "dispatcher" model; bookmarking; tagging.			YES
Volunteer intake: signup forms; NeighborLink team responsibilities; background checks; approval or denial; read-only access to the volunteer queue.			YES
Volunteer search and user profiles.			YES
Admin/volunteer dashboard: project oversight; stories; stats.	YES	BASIC	YES
Data analytics platform.	YES		YES





Admin Users

7.5 Admin access provides the following on the web platform:

- Project queue oversight: triage, edit, approve, edit, and scope submitted projects.
- Volunteer queue access (read-only): see all onboarding volunteers in your area.
- Automated notifications covering a variety of project and volunteer oversight events (configurable, email and/or text).
- Additional project controls not available to standard users.
- Advanced project search filters.
- Bulk actions, such as mass-expiring seasonal projects (ex: all snow removal requests after winter).
- Project recap and story control: highlight completed projects and surface impact stories.
- Volunteer search and profile access.
- Neighbor (client) search and profile access.

Onboarding

7.6 For most of the following, we can leverage **CSX's** own brand and info as defaults. But if your site/organization would like to have its own presence, please provide as much of the following as possible.

REQUIRED

1. Area steward name. This can be the name of your organization, **CSX Site**, or service initiative. We always position local partners as the focal point.
2. Logo in svg, webp, and/or png format. Transparent background required. a. Optional: If you also have a white/light logo for use on dark backgrounds, we have some places where it could be used.
3. Central email address and phone number.
4. One of two ways to define the geographical boundary:
 - a. A simple list of zip codes. Most/all **CSX Sites** will leverage this approach, since the call center also needs zip codes defined.
 - b. A centering point + a radius in miles. Choose this option if stewarding an entire region, metro area with outlying towns/suburbs, etc.
5. A list of admin users. These users will gain access to the following, positioned as the



primary stewards. **IMPORTANT:** Please have each of them register as volunteers through <https://www.neighborlink.org/volunteer/>, and we will promote them to admin roles!

- a. Project queue oversight (approve, deny, edit/triage/scope).
- b. Volunteer queue access (read only).
- c. Automated email and/or text message notifications covering a variety of project and volunteer oversight.
- d. Additional project controls.
- e. Additional Project Search filters.
- f. Bulk actions, such as mass expiring lists of projects (ex, expire all snow removal projects once snow has melted).
- g. Control over project recaps and stories to highlight.
- h. Volunteer search and profile access.
- i. Neighbor search and profile access.

Optional

1. "Tagline", motto, or catch phrase for your site.
2. Landing photo – a large image unique to your local area (cityscape, drone photo, landmark). NeighborLink has a generic neighborhood photo as a default.
3. Content to display on the landing page, primarily to describe who you are, your mission, **CSX**, and how/why you're leveraging NeighborLink.
4. Physical address, if your organization has a central office or a mailing address.
5. Link to your own existing website.
6. Links to any social media accounts.
7. Project expiration settings:
 - a. Projects automatically expire after a defined number of days if they're not updated in some way.
 - b. New stewards: 365 days. Gives the map plenty of time to build up opportunities before anything disappears.
 - c. Established sites: typically 90 days. Once projects flow regularly.
 - d. Adjustable. Identify any unique or seasonal circumstances.

