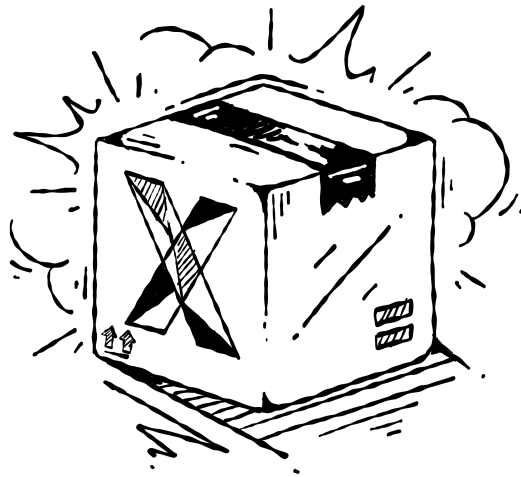




CityServeX

Community Advocate Training

Core Content - Section 1

GETTING STARTED



Module 1 — Getting Started: Welcome to Partnership

Where CityServeX Came From, and Why That Matters to You

Let me start with a story, because the story is the reason this organization exists.

About twenty years ago, in the San Francisco Bay Area, a pastor named Roger Valci kept running into the same problem. People in need were being served — by nonprofits, by government agencies, by churches, even by businesses — but almost none of those groups were working together. That created two problems at once: it wasted effort, and it left gaps. Someone in crisis could visit three different organizations and still not find the one resource that would have actually solved their problem, because no single entity was built to see the whole picture.

Roger had relationships across all of those sectors, so he did something simple: he started connecting them. That effort became CityServe of the Tri-Valley in 2012. It started with an annual budget of \$180,000. By 2024, it was managing over \$3.2 million in resources, serving more than 6,000 people a year, and fielding over 63,000 calls on its own local helpline.

When Roger moved to Central Florida in 2023, he didn't start from scratch — he brought a proven model with him, and CityServeX was born to replicate that model in cities across the country. The tagline we operate under captures it in three words: Everyday, All Lanes.

Why does this history matter to you? Because it tells you what CityServeX actually is. We are not a software company, and we are not a single service provider. We are a replication effort — we take something that has already worked, and we help your community build it too. The model you're being trained on isn't theoretical. It has been tested.

Our Mission, Purpose, and Vision

Our mission is simple to say and hard to do: to uncomplicate and humanize social service systems for the benefit of everyone who uses them.

Alongside that mission sit two more statements worth knowing by heart, because together the three of them explain the whole reason we do this work.

Our Purpose is to help people who help people find what they need. Notice who that purpose is aimed at: not just the person in crisis, but you — the Care Champion, the Resource Coordinator, the Community Advocate. CityServeX exists to equip the helpers, so the helpers can actually help.

Our Vision is a world where no one goes through crisis alone. That's the horizon we're aiming at. It's bigger than any one site, any one city, or any one Advocate — and it's exactly why the work you're about to learn matters far beyond your own community.



Our Four Values

Everything we do gets filtered through four values. I want you to actually know these, not just recognize them, because you will use them to make decisions when nobody is there to tell you what to do.

- Stories — People Over Process: Behind every case number is a human story. If a process is getting in the way of a person, the person wins.
- Empathy — Emotional Connection: Real understanding starts with genuinely connecting with someone, not just processing their paperwork.
- Creativity — Connecting the Dots: We rarely need to invent something new. Most of what a community needs already exists somewhere in it — our job is to notice the connection nobody else has made yet.
- Empowerment — Respecting People's Right to Lead Themselves: We are guides, not rescuers. The people we serve know their own lives better than we do.

If you remember nothing else from this section, remember this: when you're not sure what to do in a specific moment, ask which of these four values applies, and let that guide you.

The Four Lanes: Why We Need All Four

CityServeX is built on the belief that no single sector can solve community-level problems alone. We call these sectors the Four Lanes: Business, Faith, Government, and Nonprofit.

Here is what each lane tends to bring, and where each one tends to fall short on its own:

- Business brings: efficiency, technology, and innovation — but rarely deep, ongoing community trust.
- Faith communities bring: trusted relationships and moral credibility — but rarely formal case management systems.
- Government brings: policy, funding, and formal safety nets — but rarely fast, relational, last-mile connection.
- Nonprofits bring: specialized expertise and direct service — but rarely the capacity to coordinate across sectors.

Put all four in the same lane, moving in the same direction, and you get something none of them could build alone: a response that's efficient, trusted, well-funded, and expert, all at once. That's the whole idea behind CityServeX, and it's the idea you're being asked to carry into your community.

What CityServeX Brings, What Your Site Brings

This is a real partnership, and I want you to understand it as one — not as a licensing deal, and not as an employment relationship. CityServeX and your Partner Site are collaborators. Neither one owns or employs the other.



When your site signs the Partnership Agreement, **CityServeX** commits to 15 specific deliverables. These fall into four categories: technology and tools (including the findhelp resource database and the 888-INFO-CARE national helpline), training and certification, ongoing quality assurance, and brand and marketing support.

Your site commits to real things in return: a compensated Care Champion, one or more Community Advocates (that's you), nine or more Resource Coordinators, adequate physical space and equipment, active collaboration across all Four Lanes, local fundraising, and delivering Resource Coordination within 90 days of signing.

Neither side is a passenger in this relationship. Both sides are accountable for what they promised — and that's exactly why the first 30 days matter so much: it's when you start proving that accountability, on both sides, is real.

Words You Need to Know

Every field has its own language, and you'll hear these terms constantly, so let's define them now rather than later.

- Resource Coordination: the actual work at the center of everything: discovering, coordinating, and connecting community resources to people in crisis, done in a way that is personal and relational — not quick and impersonal. It is not clinical case management, and it does not deliver services directly. It removes the maze; it doesn't build a new building.
- Resource Coordinator (RC): the person who does that work directly — they sit with a Participant, listen to their story, and help them find their way to real resources.
- Care Champion (CC): the internal leader at your site who runs daily operations, oversees the team, and keeps the culture healthy.
- Community Advocate: that's you — the external, strategic voice. You find local heroes across the Four Lanes, convene them, and build the relationships that make Resource Coordination possible in the first place.
- **CityServeX** Liaison: your direct connection to **CityServeX's** national team — the person responsible for training and supporting Care Champions and, through them, your whole site.
- Participant: the term we use for the person receiving help — someone actively working toward self-sufficiency, not a "case" or a "client."
- Neutral Convener: someone with no stake in the outcome, whose only role is to guide, bridge, and bring people together — you'll meet this concept again when you start building a coalition.
- The **CityServeX** "Box": the full resource package — manuals, tools, training, and technology — that equips a new site to get up and running.

Resource Coordination: What It Is, and What It Isn't



I want to be direct about this because it's the single most misunderstood piece of the model.

Resource Coordination is not new. It happens informally all the time, and some organizations have already given it a name — Navigator, Care Manager, Assistant. What's uncommon is doing it well, doing it outside of a single organization's walls, and doing it as a dedicated, relational role rather than a hallway favor.

Done poorly, Resource Coordination looks like someone handing over a phone number and wishing you luck — leaving the person to find their own way through a maze of agencies that don't talk to each other. Done well, it looks like someone walking the road with you until you're actually connected to what you need.

That distinction — a maze versus a straight path — is the entire reason this role exists.

Your First 30 Days

These four weeks matter more than any other stretch of your first year, because they set the tone for everything that follows. I'm going to walk through each week in enough detail that you could follow it without anyone standing over your shoulder — though you won't be alone, and you shouldn't try to be.

Week 1 — Orient

Your first week is about orientation, not output. Nobody expects you to accomplish anything measurable yet — the goal is simply to get your bearings.

Start with your Care Champion. Within 48 hours of your start date, you should have a scheduled one-on-one with them. This isn't a formality — it's the meeting where you and your Care Champion agree, in plain language, on where your role ends and theirs begins. Bring a notepad. Ask direct questions: What does a normal week look like at this site right now? Who are the current Resource Coordinators, and what are they already working on? What's been tried in the community before, and what hasn't? You are not expected to have answers yet — only good questions.

While that relationship is forming, get the administrative pieces handled. Your CSX email and system access should be set up this week — this includes your login for the CSXU training portal and, eventually, the staff-side Findhelp platform your Resource Coordinators use daily. If access isn't ready by day two or three, that's a flag to raise with your Care Champion or CSX Liaison, not something to wait out quietly.

Use the rest of the week to meet your team — not just the Care Champion, but every Resource Coordinator already in place, any other Community Advocates, and anyone in site leadership who will matter to your work. A five-minute conversation with each person is worth more this week than reading another page of the manual. Ask what they wish someone had told them when they started.



Finally, read. Go back through the CityServeX “Box” material on the Story, the Mission, the Four Lanes, and the Terms and Definitions covered in Core Content, and make sure it’s actually sticking — not just something you skimmed once.

By the end of Week 1, you should be able to explain CityServeX's mission and the Four-Lane model in your own words, without notes, to someone who has never heard of either — and you should know your internal team by name and role.

Week 2 — Train

Week Two shifts from getting oriented to building real skill. This is where the CSXU Community Advocate training materials come in, and they cover four areas you will live in for the rest of your role: the four-lane framework, community mapping, event planning, and volunteer recruitment.

You won't execute any of these fully yet — that comes in later modules — but by the end of this week, you should understand each one at a working level:

- Community mapping is: sitting down with two or three people who already know your community well — a longtime resident, a business owner, a nonprofit director — and building an honest picture of what's already happening across each of the Four Lanes. You'll do this for real in Module 3; this week is about understanding why it matters and how the conversation is structured.
- Event planning is: how you'll eventually bring people together publicly, whether that's a small stakeholder gathering or your site's public launch. The training walks you through a standard planning cadence — invitations, logistics, follow-up — that you'll put into action in Weeks 3 and 4, and again in Module 7.
- Volunteer recruitment covers: how you'll identify and approach potential Resource Coordinators and community volunteers. The most important thing to take from this training isn't a script — it's the criteria: look for people who already show up consistently and listen well, not necessarily people with formal experience.

Once you've worked through the CSXU materials, sit down with your Care Champion again for role-specific training — this is where the general training gets translated into “here's what this actually looks like at our site.” Come with questions from what you just learned, and don't be afraid to say which parts felt unclear.

By the end of Week 2, you should be able to describe, in plain terms, what community mapping, event planning, and volunteer recruitment each involve — even though you haven't executed any of them yet.

Weeks 3–4 — Prepare for Launch

The final two weeks turn everything you've learned into a plan you can act on, and they end with two documents that make your role official.

Start building your first 90-day community engagement plan. This is not a vague intention document — it should name specific leaders you intend to contact, by name, and the specific



partnerships you intend to pursue, organized loosely by lane. A good draft is started no later than the start of Week 3, and your Care Champion should review and initial it before you move on. This plan gets submitted to your CSX Liaison by Day 30, alongside your signed agreements.

At the same time, attend CityServeX's formal onboarding training. This is typically where you'll be trained alongside other Community Advocates from across the network, and it's a chance to ask CityServeX directly — not just your local Care Champion — anything that's still unclear.

Also during these two weeks, start setting your public launch event in motion. You don't need to run the full event yet, but you should identify a likely date, a venue that fits your community, and a first-draft invite list pulled from the leaders named in your 90-day plan. Treat this the way you'll be trained to treat every future event: one clear goal, and an invite list built by asking "who MUST be here for this to succeed?"

By Day 30, all of this converges: your training is complete, you've met your core team, your 90-day plan is written and reviewed, and you're ready to step into public view. This is also when you sign the Community Advocate Job Description and the Community Advocate CityServeX Commitment Agreement — the two documents that make the role official, and the moment you formally commit to representing the mission faithfully, cultivating four-lane relationships, promoting community awareness, recruiting volunteers, and staying in honest communication with your Care Champion about what's working and what isn't.

By the end of Week 4, you should have a written 90-day plan in hand, a launch date and venue identified, and both official documents signed.

One Last Thing

You are not expected to know your community yet. You're expected to be curious enough to find out. That posture — "I don't already know everything I need to know, and I'm going to find out" — is, more than any manual, what makes this model work.

Discussion Questions

- What drew you to this role, and what part excites you most?
- What's one community need you already sense, even before any formal assessment?
- Who in your network might become a natural ally in this work?
- What part of the "collaborators, not contractors" partnership definition feels different from other roles you've held?
- Looking at the first-30-days timeline, which milestone feels most realistic, and which feels tightest?
- Why do you think CityServeX has you sign the Commitment Agreement on Day 30 rather than Day 1?





Check List: Before You Move to the Next Module

- ☐ Schedule a one-on-one with your Care Champion within 48 hours of starting.
- ☐ Confirm your CSX email and system access (CSXU training portal, Findhelp login) are set up.
- ☐ Meet every Resource Coordinator, any other Community Advocates, and key site leadership.
- ☐ Re-read the CityServeX Story, Mission, Four Lanes, and Terms and Definitions until you can explain them without notes.
- ☐ Complete the CSXU Community Advocate training materials (four-lane framework, community mapping, event planning, volunteer recruitment).
- ☐ Sit down with your Care Champion for role-specific training.
- ☐ Draft your first 90-day community engagement plan, naming specific leaders and partnerships.
- ☐ Have your Care Champion review and initial your 90-day plan.
- ☐ Attend CityServeX's formal onboarding training.
- ☐ Identify a likely launch date, venue, and first-draft invite list.
- ☐ Sign the Community Advocate Job Description and CityServeX Commitment Agreement.
- ☐ Submit your signed agreements and 90-day plan to your CSX Liaison by Day 30.

