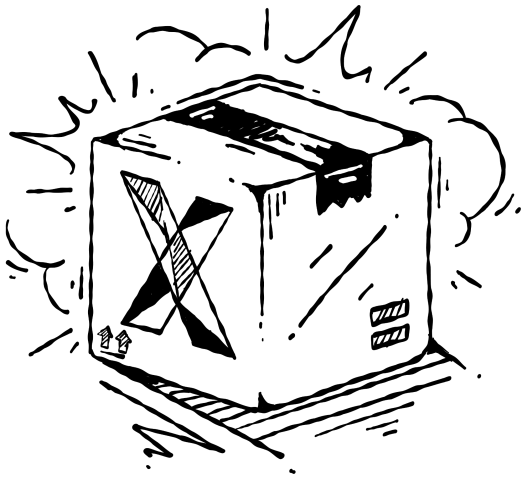




CityServeX

Community Advocate Training

Core Content - Section 5

RESOURCE PLATFORM - FINDHELP

Module 5 — Individual → CBO: Findhelp — Getting Onboarded

Why Findhelp Is the Backbone of the Model

Findhelp is the nationwide directory that makes CityServeX's promise possible in the first place. No matter where a Participant lives, there is a searchable, curated map of programs — food assistance, housing support, job training, and hundreds of other categories — covering all 42,000+ U.S. zip codes.

But here's the catch: a database is only as good as the trust behind it. That's where you come in. Every accurate, active, well-curated program listing in your community is also a potential coalition partner. And every repeated gap you notice in the data is evidence you can bring straight to a Community Based Organization to make the case for partnering with CityServeX.

The Language of Findhelp

A few terms will make the rest of this module click into place:

- Program Card: the record on the site that holds everything a Resource Coordinator or Participant needs to access a specific resource — eligibility, hours, contact information.
- Community Based Organization (CBO): the organization actually providing the program behind a given listing.
- Connect Button: the button on a Program Card that starts the referral process, linking a Resource Coordinator or Participant directly to the organization providing the service.
- Claimed program: a listing marked with a checkmark, meaning the organization itself actively maintains it. This is always the preferred referral, because the information is verified and current — Findhelp's quality team manually reviews 95% of listed programs every six months.

Findhelp exists in two forms at your site: the staff-side platform (login required, full referral tracking and case notes) that your Resource Coordinators use daily, and cityservex.help, the public self-service version anyone can search. As Community Advocate, you'll use Findhelp less for direct casework and much more as a resource-discovery and relationship-building tool.

Turning Search Results Into Relationships

Search for and review local program listings in your community's most common need categories. Note where information is outdated, where a program is unclaimed, or where an entire need category has almost no local listings at all. When you find one of these gaps, you have two moves available to you: raise it with a potential CBO partner as your opening line — "We noticed housing assistance in this zip code barely shows up in the database — would you be open to being listed,

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or partnering with us to close that gap?" — or, if the asset is small, informal, or the organization isn't ready for that conversation yet, add or suggest the Program Card yourself so the community can benefit right away. The how-to for that second move follows below.

Over time, patterns in what your Resource Coordinators are searching for — repeated dead ends, frequently full programs — become some of your strongest coalition-recruiting evidence. There's a real difference between walking into a nonprofit boardroom with "we have a general sense you might be able to help" versus "our data shows this specific need surfaces every week, and there is no active local resource for it." The second version gets you a meeting. The first rarely does.

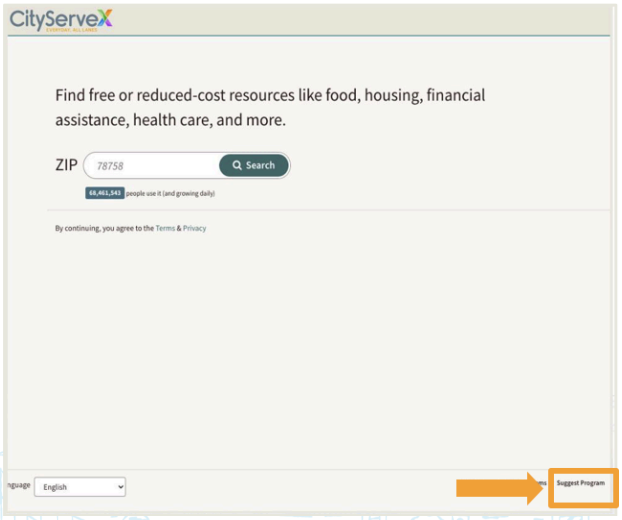
How to Create a Program Card in Findhelp

The Community Advocate is a Findhelp evangelist, advocating that every non-profit or service provider should be on the Findhelp platform so that the entire city can benefit from their services.

Every time you or a Resource Coordinator discovers a real community asset — a food pantry, a small nonprofit, a church benevolence program — that isn't already on Findhelp, that's a gap in the city's safety net, not just a gap in the database. This is how you close it.

Step 1 — Start from the "Suggest a Program" Link

From your site's home page, you can add a new program using Program Manager, or suggest one through the "Suggest a Program" link. Before submitting anything, always check whether the program already exists, to avoid creating a duplicate listing.



You can add a new program using the Program Manager or suggest one through the "Suggest a Program" link.

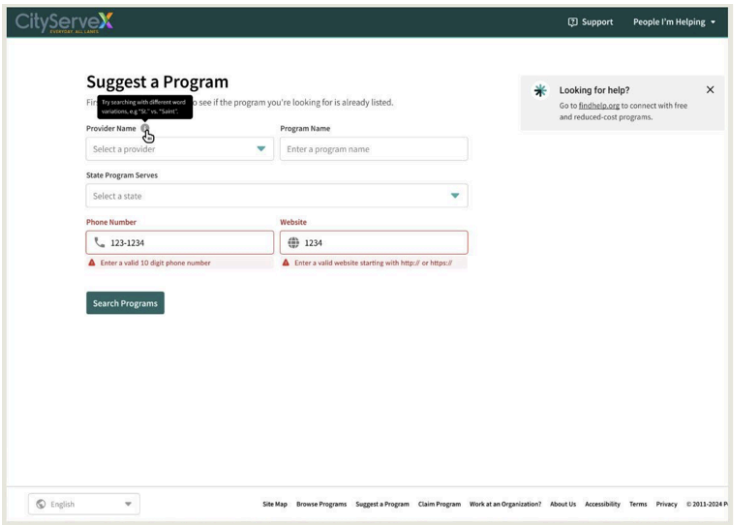
Before submitting, check if the program already exists to avoid duplicates. Start by searching on the Suggest a Program page.

The "Suggest Program" button on the CityServeX Findhelp home page.

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Step 2 — Check for Duplicates

On the Suggest a Program screen, enter the following to search for a possible match: Provider Name, Program Name, and State the Program Serves. And either of the following: Phone Number or Website. Then click Search Programs to see if the program is already on the platform.



Enter in the following:

- Provider Name
- Program Name
- State the Program Serves

And either of the following:

- Phone Number
- Website

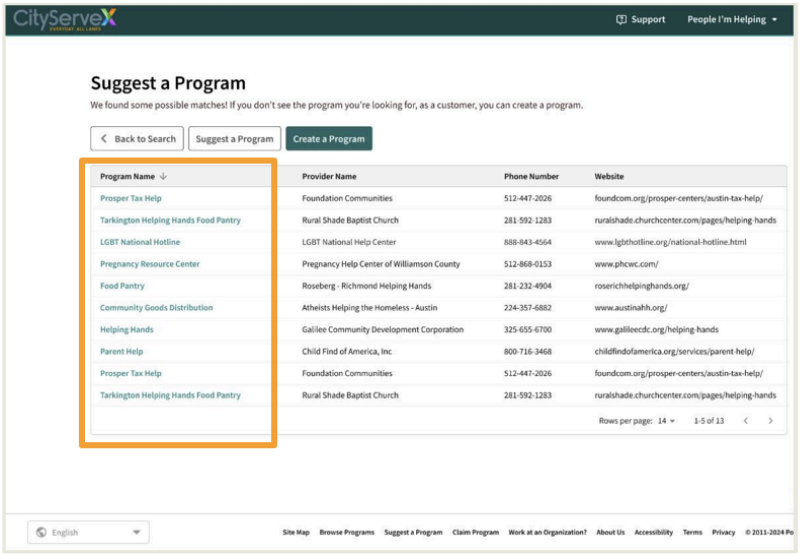
Then click Search Programs to see if the program is already on our platform.

The Suggest a Program search form — checking for duplicates before adding anything new.

Step 3 — Review the Results

If you see the program in the results list, don't create a new listing — use Program Manager to edit and improve the existing one instead. Clicking on the program name link takes you straight to that program's card.

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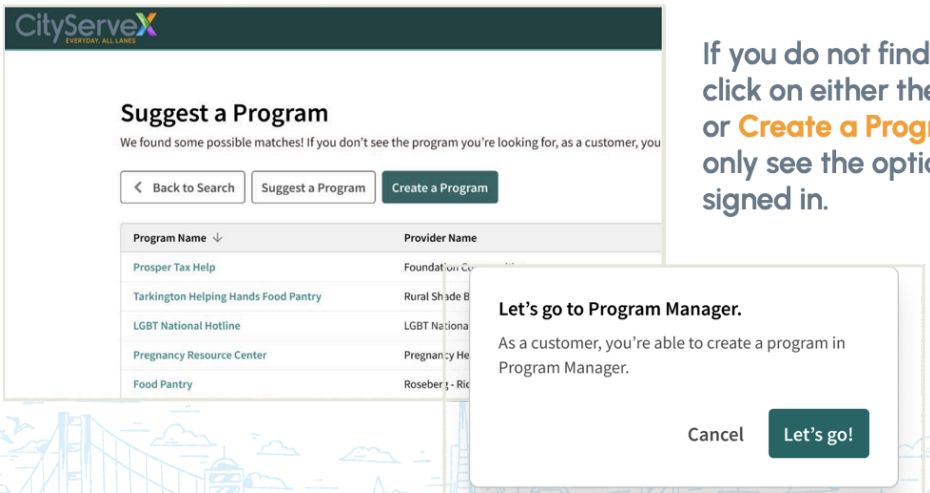
If you see the program in the results list, you can use Program Manager to make the edit.

Clicking on the program link will take you to that program's card.

Search results for a possible match — with Suggest a Program and Create a Program buttons above the list.

Step 4 — Add the New Program

If the program genuinely isn't in the results, click either the Suggest a Program or Create a Program button to go into the Program Manager tool. You will only see the option to create a program if you are signed in.

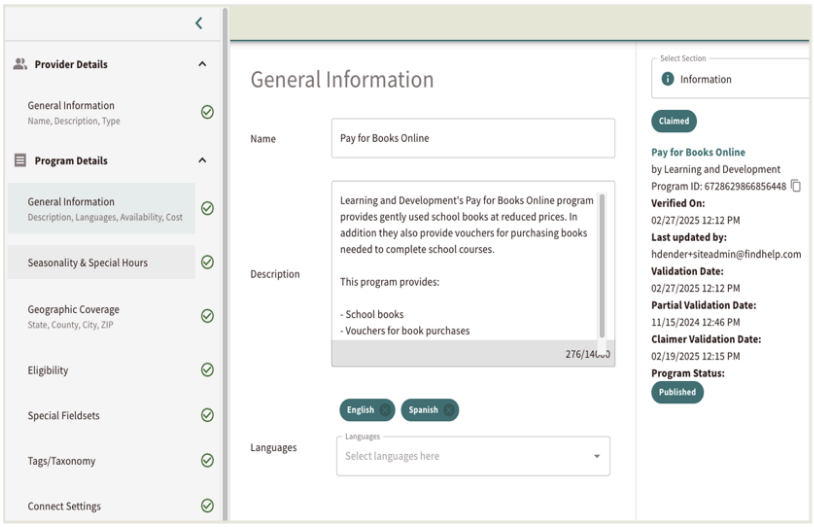


If you do not find the program, you can click on either the **Suggest a Program** or **Create a Program** button. You will only see the option to create if you are signed in.

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Step 5 — Fill Out the Program Card in Program Manager

Program Manager lets you build out the full Program Card: General Information (name, description, languages), Program Details (description, languages, availability, cost), Seasonality & Special Hours, Geographic Coverage, Eligibility, Special Fieldsets, Tags/Taxonomy, and Connect Settings (how a Resource Coordinator or Participant contacts the program).



You can add select new programs or edit existing ones. You cannot add or edit:

- **National programs**
- **Programs with confidential office locations**
- **Programs tagged as clinical abortion or pregnancy centers**

The Program Manager tool, showing a completed Program Card ready for review.

A few things you cannot add or edit through Program Manager: national programs, programs with confidential office locations, and programs tagged as clinical abortion or pregnancy centers. For any of these, or for a program that isn't editable, use the Suggest an Edit option on the program card instead, and Findhelp's Network Curation Team will review it.

What Happens Next

Every suggestion or new program you submit goes to Findhelp's Network Curation Team, who use a combination of people and technology to validate the information before it's published. This is the same process that keeps the entire national database accurate — hundreds of ideas come in every week from users just like you, and the Curation Team reviews and publishes the changes.

Findhelp also runs a free weekly Program Manager training that walks through the tool in more depth. You can sign up at company.findhelp.com, under Resources, then Customer Training.

When a Referral Fails

Have a plan ready for when the first CBO can't help — a wait list, a funding gap, whatever the reason. Document it, try a second option, and keep the individual informed rather than letting them go silent. Say this to yourself as often as you need to: a referral made is not the same thing

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as a need resolved. Closing that loop is exactly where trust in the whole system is either built or lost, one case at a time.

Your Findhelp Routine

- At least quarterly: run searches across your site's most common need categories, and log outdated, unclaimed, or missing listings on a simple tracking sheet — need category, organization, status, date noted.
- Within 30 days of finding a gap: turn each unclaimed or missing listing into a scheduled outreach conversation with that CBO.
- Monthly: meet with your Resource Coordinators to review which searches are hitting dead ends or frequently full programs, and add those patterns to your coalition-recruiting evidence file.
- Every time a referral fails: make sure the Resource Coordinator documents it, tries a second option, and keeps the Participant informed — and when the need does get resolved, consider turning it into a "Close the Loop" success story to share with your CBO partners.

One Last Thing

It's easy to think of Findhelp as just a search tool for Resource Coordinators. For you, it's something more — a running record of exactly where your community's safety net has holes in it, and a built-in list of talking points for every future coalition conversation you'll ever have.

Discussion Questions

- What need categories do you expect to search most often at your site?
- How will you track whether a referral actually resulted in help received?
- What will you do when the best-fit CBO has no capacity?
- Why does an unclaimed listing matter almost as much as a missing one?
- How can referral patterns — not just individual referrals — become recruiting evidence for coalition building?
- What's the risk of treating "a referral made" as the same thing as "a need resolved"?

Check List: Before You Move to the Next Module

☐ Complete Findhelp platform training and certification.

☐ Run practice searches across your site's most common need categories.

☐ Log outdated, unclaimed, or missing listings on a tracking sheet.

☐ Identify at least one unclaimed or missing listing to raise as a coalition-recruiting conversation.

☐ Schedule outreach conversations with the CBOs behind gaps you found, within 30 days.

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☐ Meet with your Resource Coordinators to review referral dead-ends and add patterns to your evidence file.

☐ Confirm a plan exists for documenting and following up on failed referrals.

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