



## Community Impact Lead Basic Facilitator Course

**Purpose:** This self-guided course equips Findhelp partners with a clear **understanding of the tools available** to community organizations on the Findhelp platform, **the value those tools deliver**, and **best practices for introducing and demoing the platform**. Upon completion, Community Impact (CI) leads are certified to independently lead conversations and trainings with community organizations.

### How to complete the course:

- The course design encompasses short videos, most utilizing live demonstrations to walk participants through the tools and features on the platform.
- Each video can be watched as many times as needed. The course is self-paced and self-guided.
- The course comprises one final Knowledge Check, to be submitted after the last module.
- If you have any questions or difficulties, please reach out to your Findhelp Customer Success Manager for assistance.

| Video  | Description  | Completed? | Supplemental Resources                                 |
|--|--|------------|--|
| <b>Module 1:</b><br><a href="#">Introduction</a>   | This video introduces the course structure, why it is important, and what will be accomplished upon completion.                                  |            |  |
| <b>Module 2:</b><br><a href="#">The Basics</a>   | This module shares more about Findhelp’s mission and purpose. Course participants can expect to craft their own partnership message and mission. |            | <a href="#">Applied Learning</a>                       |
| <b>Module 3:</b><br><a href="#">Program Claiming &amp; Program Suggestions</a>                         | This module demonstrates the first step organizations take as they join the Findhelp network: program claiming & suggestions.                    |            | <a href="#">How to Claim Your Programs (One-Pager)</a> |
| <b>Module 4:</b><br><a href="#">Part 1: Search</a><br><a href="#">Part 2: Refer</a>                    | This module demonstrates platform foundations: search, find, and connect functionality.  |            |  |
| <b>Module 5:</b><br><a href="#">Organization Tools</a><br><a href="#">People I’m Helping Dashboard</a> | This module demonstrates the People I’m Helping Dashboard and how Navigators can use this feature to track progress and manage referrals.        |            |  |

| Video  | Description   | Completed? | Supplemental Resources   |
|--|---|------------|--|
| <b>Module 6:</b><br><a href="#">Organization Tools Inbound Referrals Dashboard</a> | This module demonstrates how organizations can track, monitor, and update referrals.  |            | <a href="#">Referral Tracking for Organizations (One-Pager)</a>  |
| <b>Module 7:</b><br><a href="#">Organization Tools Edit Programs &amp; My Team</a> | This module demonstrates how Organizations can update and manage their program listings, ensuring accurate and up-to-date program and contact information. Additionally, it reviews how Organizations can work as a team utilizing the My Team feature. |            | <a href="#">Team Sharing for Organizations (One-Pager)</a>   |
| <b>Module 8:</b><br><a href="#">Organization Tools Screener</a>                    | This module demonstrates how organizations can set up and customize a Screener intake tool and the benefits of utilizing this tool to best connect the right people to the right service.   |            |  |
| <b>Module 9:</b><br><a href="#">Organization Tools Analytics Dashboards</a>        | This module demonstrates the Findhelp free suite of organization dashboards.  |            | <a href="#">Impact Reporting for Organizations (One-Pager)</a>   |
| <b>Module 10:</b><br><a href="#">Course Conclusion and Knowledge Check</a>         | This module walks course participants through final calls to action for their own training. Additionally, it directs participants to final steps to wrap up this course.<br><br><a href="#">Please complete the Knowledge Check here!</a>               |            | <a href="#">Sample agenda for live 1:1 demo</a><br><br><a href="#">Training Tips Throughout Course</a> |

## Post-Course Checklist

Your Findhelp team is available to support your post-course success! Please be sure to connect with them to discuss the following items to help you put this in action:

- Setting up and claiming a demo program on your version of Findhelp
- Practicing a 101 demo to a colleague (how to search, refer, and track clients)
- Tailor templates for presentations (ex. PowerPoint and talking points)
- Prerequisites for joining the Intermediate CI Lead Course



## Additional Resources

Below are additional materials to support continued learning for CI Leads.

| Video  | Description  |
|--|--|
| <a href="#"><u>Organizations Tools Scheduler</u></a>           | A look at the scheduler tool and how an organization can set one up.   |
| <a href="#"><u>Certifications</u></a>                          | Our Findhelp Certification program for community partners. Take the brief quiz to become findhelp certified, yourself!                           |
| <a href="#"><u>Trusted Networks Curation &amp; Process</u></a> | A review of our Open & Trusted Networks.   |
| <a href="#"><u>Helper-Seeker</u></a>                           | This one-pager can be shared with organizations or individuals in need who are beginning to learn about Findhelp and how to utilize our network. |
| <a href="#"><u>Free Tools for Organizations</u></a>            | An overview of each of the free tools available for organizations.   |
| <a href="#"><u>Findhelp &amp; 2-1-1</u></a>                    | Findhelp's approach to partnership with 2-1-1s.  |
| <a href="#"><u>Findhelp Differentiators</u></a>                | Talking points for customers on Findhelp differentiators.  |
| <a href="#"><u>Frequently Asked Questions</u></a>              | This one-pager walks reviews common questions about Findhelp, our network, and our privacy approach.   |
| <a href="#"><u>Support Portal</u></a>                          | Findhelp's support portal with articles and materials to troubleshoot site tools and features.   |