



## Community Engagement Lead Basic Facilitator Course

**Purpose:** During this self-guided training course, members of the findhelp team review the tools available to community organizations using findhelp platforms and their inherent value to those organizations, as well as share tips and tricks for introducing the platform to the community and demoing live. Upon completion of the course, customer Community Engagement (CE) leads are certified to independently host their own 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 designed to be self-paced and self-guided.
- The course comprises one final Knowledge Check, to be submitted after the last module.
- The final step to complete the course and obtain certification is to schedule a live demonstration with your findhelp Community Engagement Manager.
- If you have any questions or difficulties, please reach out to your findhelp Community Engagement Manager or Customer Success Manager for assistance.

Video	Description	Completed?	Supplemental Resources
<a href="#">Module 1: Introduction</a>	This video introduces the course structure, why it is important, and what will be accomplished upon completion.		
<a href="#">Module 2: 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>
<a href="#">Module 3: Program Claiming &amp; Program Suggestions</a>	This module demonstrates the first step organization’s take as they join the findhelp network: program claiming & suggestions.		<a href="#">How to Claim Your Programs (One-Pager)</a>
Module 4: <a href="#">Part 1: Search</a> <a href="#">Part 2: Refer</a>	This module demonstrates platform foundations: search, find, and connect functionality.		



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<a href="#">Module 5: Organization Tools People I'm Helping Dashboard</a>	<p>This module demonstrates the People I'm Helping Dashboard and how Navigators can use this feature to track progress and manage referrals.</p>		
<a href="#">Module 6: Organization Tools Inbound Referrals Dashboard</a>	<p>This module demonstrates how Organizations can track, monitor, and update referrals.</p>		<a href="#">Referral Tracking for Organizations (One-Pager)</a>
<a href="#">Module 7: Organization Tools Edit Programs &amp; My Team</a>	<p>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.</p>		<a href="#">Team Sharing for Organizations (One-Pager)</a>
<a href="#">Module 8: Organization Tools Screener</a>	<p>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.</p>		
<a href="#">Module 9: Organization Tools Analytics Dashboards</a>	<p>This module demonstrates the findhelp free suite of organization dashboards.</p>		<a href="#">Impact Reporting for Organizations (One-Pager)</a>
<a href="#">Module 10: Course Conclusion and Knowledge Check</a>	<p>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.</p> <p><a href="#">Please complete the Knowledge Check here!</a></p>		<a href="#">Sample agenda for live 1:1 demo</a>  <a href="#">Training Tips Throughout Course</a>



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### Additional Resources

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

<a href="#">Organizations Tools: Scheduler</a>	A look at the scheduler tool and how an organization can set one up.	
<a href="#">Certifications</a>	Our findhelp Certification program for community organizations.	
<a href="#">Trusted Networks Curation &amp; Process</a>	A review of our Open & Trusted Networks.	
<a href="#">Helper-Seeker</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="#">Free Tools for Organizations</a>	An overview of each of the free tools available for organizations.	
<a href="#">Findhelp &amp; 2-1-1</a>	Findhelp's approach to partnership with 2-1-1s.	
<a href="#">Findhelp Differentiators</a>	Talking points for customers to on findhelp differentiators.	
<a href="#">Frequently Asked Questions</a>	This one-pager walks reviews common questions about findhelp, our network, and our privacy approach.	
<a href="#">Support Portal</a>	Findhelp's support portal with articles and materials to troubleshoot site tools and features.	