Community Based Organization Communication Toolkit

How (and When) to Talk to Direct Service Community Based Organizations (CBO) About Claiming Their Programs

Step 1: Identify a pilot group of key CBOs
- Pick 10-15 CBOs that you either already have strong relationships with, or who you believe will be critical participants in both serving and referring individuals. Think about selecting a diverse group of organizations that have strong community ties and relationships with other CBOs.
- For Enterprise Customers, you can also look at your Analytics to identify programs that are being clicked and referred to the most, and reach out to those CBOs.

Step 2: Make sure programs are listed on the platform
- Add any missing programs through Suggest a Program or add several programs using this template.

Step 3: Reach out to those CBO's (see below for more detail on ways to do this)
- Reach out to your initial group of CBOs in the way that makes the most sense for your organization
    - **Send emails:** Send out an email to each organization welcoming them to the network and sharing the custom link for them to see and claim their listings. Follow up with a reminder email or phone call if they don't respond.
    - **Make calls:** If you have an available staff member, block out 1-2 hours to call through the list of CBOs.You can welcome them to the community and follow up with the email link for them to complete the process of claiming their listings.
    - **Host a meeting or event:** Host a meeting or event to bring your group of CBOs together so they can learn more about what you are creating. Have a computer or tablet available to help people claim their listings on the spot.

Step 4: Have programs claim their listings
- Have programs claim their programs so that they can unlock their referral dashboard and reports.

Step 5: Set Up Training
- Set up a training for all of your partners to learn how the platform works.
    - Aunt Bertha can support you by either providing the training or by providing you with materials to facilitate your own. Aunt Bertha also offers a weekly group training for all customers on Wednesdays at 1pm CT that partners can join.

Step 6: Encourage CBOs to add search boxes to their websites

- This is super easy to set up! Interested CBOs can click here to sign up and the Aunt Bertha team will take care of the rest. Click here for sample email outreach.

Step 7: Add more CBOs to your network
- After assessing your initial efforts, identify subsequent sets of CBOs to reach out to
    - You can identify this list of CBOs by asking each member of your initial provider group to identify (and possibly support outreach efforts to) 5-10 of their key partners.
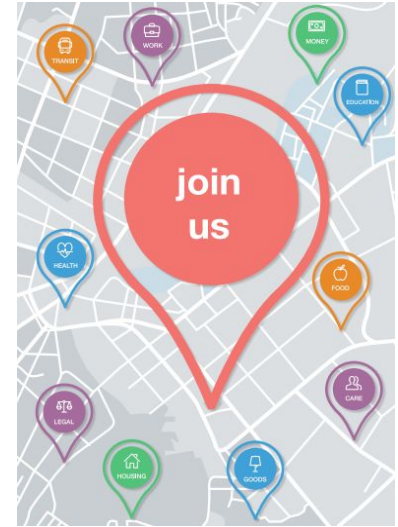
Checklist for talking to CBOs

❏ Provide some basic information about **[Platform Name]** powered by Aunt Bertha
❏ Invite them to claim their programs and provide some information on what benefits they'll receive
❏ Make sure you include your personal claim link *[Platform URL/claims]* so they know where to claim
❏ Offer them ways to share your platform, (i.e. Social Media, newsletters, etc.) and encourage them to utilize our Share Page
❏ Share the Provider 101 Guide for tips, tricks, and how-tos of managing their programs
❏ Offer the Service Provider Best Practices Deck for those CBOs that want to train their staff

Main Talking Points

● **[Platform Name]** is an online directory of free and reduced cost social service programs.
● Claiming your program on **[Platform Name]** allows you to:
  ○ Update your services so more of the people you serve (and less of those you cannot help) come to you based on your service description.
  ○ Update your contact information and assure a person in need gets the dignity of a response to their request for help
  ○ Gain access to other, **free** features like:
    ■ Referral and outcome tracking tools
    ■ Referral screening tools
    ■ Appointment scheduling
    ■ Reporting about your program
● Listing and claiming your program(s) is **free** of cost.
● Team Management gives multiple users on your team permission to edit your programs and see reports.
● The Screening Tool adds an additional layer of questions which ensures that a person who is interested in your program is eligible for those services.
● The Appointment Scheduler allows people to schedule appointments with your program directly through **[Platform Name]**

Sample Platform Introduction/Launch Email

Hi there [*name*],

[*Personal anecdote, if appropriate*]. I'm writing today to introduce you to [*Customer/Fellow*]*'s* brand new website, [*Platform Name*]. [*Platform Name*] was created to help people in need find and connect with the vast (but sometimes hard to navigate) social service programs in [*city/county/etc*] - just enter your zip code and you're immediately off and running. Best of all, it's free.

Because [*Provider name*]'s programs are already listed in the database, I invite you to take the next step and join us by claiming your program listings. Just click here [*Platform URL/claims*] and you'll be among other direct service community based organizations that are changing the way people access social services.

Need help getting started? Watch this video playlist for step-by-step training.

Claiming your programs will allow our organizations to seamlessly work together to help people in need access your services. Once claimed, you can update your programs' details and contact information at any time to

make sure [Customer/Fellow name] [clients/patients/users] can access your most up-to-date services, and those in need can connect to you with ease. Additionally, there are other, free tools you'll unlock once you claim--click here to learn more about those now.

Please don't hesitate to reach out with any questions. Thank you again for the work you do, everyday.

Best,
[Contact Name]

Resource Support Page

about.auntbertha.com/provider
Go here for any and all resources related to provider claims and onboarding.

Frequently Asked Questions & Answers

1. **Why would I list my program on Aunt Bertha?**
   Listing your program allows more of the right people to find and connect with your services. Through a quick zipcode search, people in need (we call them seekers) can easily find the services they need in their area. We know you're already doing amazing work in your community--increase the impact of that work by listing on **[Platform Name]** today.

2. **What is "claiming" my program?**
   Simply, claiming your program makes you the "keyholder" to the listing on **[Platform Name]**. It unlocks free features like: the ability to update your program's information (location, hours of operation, availability, eligibility requirements, etc), managing referrals in real time, and access to customized reporting and analytics tools.

3. **How do I claim my program?**
   It's simple! Head over to **[Platform URL/claims]** to get started. Follow the how-to guide here if you need more help.

4. **What happens after I claim my program?**
   Well first, thank you! You'll be hearing from a team member at Aunt Bertha, the technology company that powers **[Platform Name]** who can act as a resource for any questions you may have about the new free features you've unlocked. You can also head here for more information and how-to's. Still not finding what you need? Email the Aunt Bertha team at community@auntbertha.com.

5. **What are the benefits of claiming my program?**
   Claiming your program has tons of great (and free!) benefits. When you claim today, you will…
   1) Have the ability to get the right information about your programs to people in need by easily updating key information, like: your location, hours of operation, availability, eligibility requirements, supported languages, etc.

   2) Gain access to free tools to help you help others, including:
      a) Referrals and outcome tracking
      b) The ability to link to an eligibility screener or your own online application
      c) Analytics of what programs and services people are searching for in your area, which can be exported for use in impactful presentations and funding applications

    d)　Appointment scheduling directly from the platform

  3)　Be identified as a Claimed Provider on **[Platform Name]** with a badge on your program listing, helping you stand out as an engaged and valid resource.

6. **How much time does it take to manage my listing?**
Updating your listing is easy and only takes a couple of minutes. Follow the how-to-guide [here](#) or watch this quick [video](#). You only need to update your program's listing when something has changed. Have you moved to a new office? Changed your eligibility requirements? Is your availability full? Just a couple minutes lets people know your program's most up to date information.

7. **How much does it cost to list/claim my program?**
Listing and claiming your program on **[Platform Name]** is FREE! The more programs we can list on **[Platform Name]**, the more that people in need can find the services that they deserve.

8. **My organization is really small. How can [Platform Name] help me?**
[Platform Name] helps organizations of all sizes. We know it's not about driving the most people to your program, but driving the *right* people to your program. Claiming your listing allows you to fine tune your program's search details, so people can find out if they're eligible for your services even before talking with you. At the same time, updating your listing takes just a few minutes and is only necessary when something has changed within your program.

9. **My organization is really large. How can [Platform Name] help me?**
[Platform Name] works with organizations of all sizes. As a large provider, we know that impact is important to you. Claiming your listing allows you to use the reporting tool to access customized data like how often your program has shown up in searches and how many seekers received help from your program. Additionally, you can manage the referrals for all of the programs offered by your organization in one, centralized location.