



Introduction



Introduction

KEY POINTS: INTRODUCTION

- The Roadmap for Community Engagement (aka **Roadmap**) provides tools, real-life examples, and lessons learned from successful **community-engaged research programs** to help guide future programs.
- Working alongside trusted community leaders and organizations from the start can create **community-engaged research programs** that have a strong impact.
- Community members know what works best for them—listen, involve them, and share decision-making power.
- For help navigating the **Roadmap**, see the Compass for Project Planning.

About the Roadmap

The **Roadmap** for Community Engagement can help you build **community partnerships** and work with trusted community leaders to create strong, long-lasting **community-engaged research programs**, especially in underserved areas. A public health program can be any program that contributes to community well-being, not just healthcare-related programs. Such programs may support youth, housing, transportation, safety, and economic development. They also include **public health programs** that aim to protect and improve the health of people and communities. Public health programs that include **research** involve collecting information to answer questions, solve problems, or improve understanding. Community organizations and community members, academics, public health professionals can lead/co-lead **community-engaged research programs**.

This **Roadmap** guides public health research programs through a **tiered engagement** model. This model prioritizes collaboration between **anchor partners**, or large community organizations that have established trusted relationships with smaller, local **community-based organizations**. In this model, anchor partners support local organizations in guiding them through the steps to carry out public health research programs.

Community engagement is essential because it places the community members' voices front-and-center. Community members know their community's needs best and can give valuable advice about coordinating a successful program. When community members are involved from start to finish, programs are more likely to address local needs and gain public support. Community engagement makes programs more effective, trusted, and longer lasting. Simply put, programs work better when communities co-lead and co-design them.

Community engagement is particularly important when working with historically marginalized groups to ensure they feel seen, respected, and included. It can also help you understand and navigate the racial, political, and religious landscape of communities. This Roadmap can help at any stage but is particularly useful in early planning. Establishing partnerships early allows for the best chance to build a collaborative program.

The **Roadmap** was developed based on experiences using a community-engaged approach to distribute more than 2 million free at-home COVID tests across U.S. communities. It includes insights from community members, researchers, project leaders, and health communicators.

Who Can the Roadmap Help?

Anyone who wants to improve community health by engaging community members can learn from the **Roadmap**.

A program may come from:

- Community-based organizations
 - Nonprofits and non-governmental organizations
 - Faith-based organizations
 - Veterans' groups
 - Tribal health organizations
 - Fraternal organizations
 - Service clubs
 - Parks and recreation departments
 - School/youth program organizations
 - School/youth program organizations
- Local health organizations
 - Public health agencies
 - Community hospitals and clinics
 - Federally Qualified Health Centers
 - First responders and mobile response teams
- Academic and research organizations
 - Colleges and universities
 - Academic research organizations





Using the Roadmap

This **Roadmap** outlines the necessary steps to plan, run, and maintain a community-engaged research program that works closely with the community. Use it as a step-by-step guide, reviewing from start to finish, or refer to the sections you need. Please also refer to the **Glossary** for definitions of key terms used throughout this document. Additionally, the [Resource Library](#) includes helpful documents and templates for supporting your community-engaged research program.

The Compass in the next section outlines the most relevant content for each program stage.

Overall, this Roadmap covers:

- **Community engagement**
- **Delivery of a public health program**
- **Communications and marketing**
- **Operations and logistics**
- **Data collection and reporting**

Compass for Project Planning

The below table is designed to help you think through each step of your program, regardless of where you are in the process. It highlights key actions, important considerations, and points to helpful tools and templates in the Roadmap. You do not need to follow the table in order; you can start with the sections that best match your current needs and skip around as needed.

The table is meant to be used actively—print it out, make notes, and use it in meetings to guide discussions and next steps. The table is available as a standalone document and is also [accessible online](#), including on mobile devices for convenience.

Current Location	Route Overview	Key Milestones and Decision Points	Navigation Tools and Resources
Reflecting prior to startup	<p>Before meeting with partners and starting activities, take time to reflect on the issue that you're trying to address.</p> <p>All partners should work through questions together and reflect on the problem and co-design the project.</p>	<ul style="list-style-type: none"> • What deeply matters to you, and how does it connect to the issue you want to address? • What is your current understanding of the issue, and what gap or need are you hoping to fill? • How does our community currently understand or experience this issue? • What does meaningful success look like in this effort? • Who can support or collaborate with you to make this vision a reality? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 3.1: Building a Program to Last • See Program Planning Worksheet • See SMART Goals Template • See SWOT Analysis Template • See Community Pulse Survey
Engaging early with intention	<p>Building trust and collaboration from the start ensures that the research addresses the community's most important issues and encourages continued teamwork.</p>	<ul style="list-style-type: none"> • Listen to the community and find shared goals. • Build relationships with trusted community leaders and groups. • Be open about the project and involve partners in planning from the start. • Be transparent about what research can offer, what participation will look like, and how decisions will be made. 	<ul style="list-style-type: none"> • Section 1.3: Why does Community Engagement Matter? • Section 4.2: Identifying a Program Partner • Section 4.5: Establishing Goals and Metrics • See Preparing for Community Partnerships Checklist • See Community Demographics Template
Identifying the question and refining the problem	<p>Finding a specific, focused question can help guide the program as it solves a problem or fills a knowledge gap.</p> <p>Program collaborators may already know the problem they are trying to solve--asking these questions may help refine it.</p>	<ul style="list-style-type: none"> • What specific problem, challenge, or unmet need is our community experiencing? • How can this question be more specific? • How will the question be measured? • Are there resources available to solve the problem? • What are the goals of the program, initiative, or event? 	<ul style="list-style-type: none"> • Section 1.3: Why does Community Engagement Matter? • Section 3.0: Planning for Lasting Impact • Section 4.0: Building the Program Framework • Section 4.1: Partnering with a Community • See SMART Goals Template • See Community Pulse Survey • See SWOT Analysis Template

<p>Designing the program</p>	<p>A well-designed initiative, large or small, involves creating a detailed plan that outlines how it will be run. Answering key questions can help guide the design process.</p>	<ul style="list-style-type: none"> • Who will participate, and how will we ensure they represent our community? • What ethical considerations and protections are needed for participants? • What resources, strengths, and partnerships can support this effort? • How will the program operate, including data collection and evaluation? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 4.0: Building the Program Framework • See Program Planning Worksheet • See SMART Goals Template • See Gathering and Displaying Program Data Information Sheet • See Communications Plan Template
<p>Organizing resources</p>	<p>Programs require funds for staff, equipment, and participant compensation, and may receive funding through grants, foundations, or grassroots fundraising. Collaborators must plan how to best use those funds.</p>	<ul style="list-style-type: none"> • What resources and tools (such as: staff, equipment, and materials) are needed, and how will we budget for them? • How will we monitor spending and address potential challenges (like supply delays) to stay on track? 	<ul style="list-style-type: none"> • Section 3.0: Planning for Lasting Impact • Section 3.5: Adjusting to Change • Section 3.6: Budget and Financial Planning • Section 4.2: Building a Team • Section 5.2: Distributing Program Supplies • See Program Planning Worksheet • See SWOT Analysis Template • See SMART Goals Template
<p>Collecting information</p>	<p>Programs gather the information needed to answer their research questions. This involves using the methods and tools established when designing the program.</p>	<ul style="list-style-type: none"> • Decide how you'll collect data—like surveys, interviews, or observations. • Train your team, test your tools, and make a schedule. • Check your data as it comes in and write down any changes or problems. • Keep private info safe and store everything in a clear system. 	<ul style="list-style-type: none"> • Section 4.5: Understanding Research Requirements • Section 4.6: Determining Data Needs • Section 5.5: Collecting Data and Monitoring Progress • See Community Pulse Survey • See Gathering and Displaying Program Data Information Sheet • See Community Partner Feedback Survey
<p>Understanding the data and sharing what you learned</p>	<p>Once the data is collected, examine it to find patterns, test ideas, and draw conclusions. Communicating results ensures program findings reach the right people, such as community members, policymakers, or the broader public.</p>	<ul style="list-style-type: none"> • Fix mistakes and remove incomplete answers. • Find trends, common ideas, or differences in the data. • See how the data helps you understand your topic—or shows you something new. • Decide who needs to hear your results. • Use charts, graphs, or pictures to make your data easy to understand. • Share your findings through presentations, posters, websites, or social media. • Protect people's privacy and give credit to those who helped. 	<ul style="list-style-type: none"> • Section 4.6: Determining Data Needs • Section 5.5: Collecting Data and Monitoring Progress • Section 5.6: Gathering Feedback and Sharing Updates • Section 6.2: Reflecting • Section 6.3: Sharing Finding and Results • See Gathering and Displaying Program Data Information Sheet • See Community Partner Feedback Survey • See Program Reflection and Debrief Worksheet
<p>Reflecting and improving</p>	<p>Reflection strengthens future research, builds strong partnerships, and develops a culture of learning and growth.</p>	<ul style="list-style-type: none"> • Check if your program met its goals. • Get feedback from everyone involved. • Talk about challenges and solutions. • Note successes and lessons learned and share them. • Celebrate and thank your team. 	<ul style="list-style-type: none"> • Section 6.2: Reflecting • Section 6.3 Sharing Findings and Results • Section 6.4: Maintaining Relationships • See Program Reflection and Debrief Worksheet • See Community Partner Feedback Survey • See Community Pulse Survey • See Gathering and Displaying Program Data Information Sheet

Learning by Example

The **Roadmap** contains tools and templates developed from the experience of several community-engaged public health research programs, including **Say Yes! COVID Test, You & Me COVID-Free**, and **You & Me: Test and Treat**. These programs aimed to slow the spread of COVID by giving free, rapid, at-home COVID tests to underserved communities. The SYCT and YMCF programs also focused on addressing gaps in COVID testing that led to higher COVID infection rates and deaths in historically marginalized populations. The **Roadmap** also draws from lessons learned based on other **community-engaged public health research programs** like **Mpox** and **Youth Empowered Self Care**.

These programs wanted to design an approach to community engagement that other research programs could easily reuse. Although the programs took place during a pandemic, the lessons may be applied to any future health crisis or public health research program.

Engagement strategies helped these research programs reach underserved populations and increased public confidence in their goals. Throughout this **Roadmap**, you will find real-life examples from these and other **community-engaged public health research programs**. Each section of the **Roadmap** will explain how to use tools that worked in the past and avoid common mistakes. The resources and lessons in this **Roadmap** can help you design and implement a successful community-engaged public health research program.



Reviewing Community Engagement Principles

Before starting, it is important to understand the basics of community engagement.

What Is a Community?

A community is a group of people with a common identity, purpose, or interest. This could be based on location, job, ethnicity, or sexual orientation, for example. Some communities may face higher risks of illness. In public health research programs, working with a community helps unite people, plan effective strategies, and tackle health challenges.

What Is Community Engagement?

The Centers for Disease Control and Prevention defines community engagement as “the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the well-being of those [people](#).” Community engagement encourages local participation through shared expertise, collective decision-making, and support for programs that improve the community’s well-being.

Are There Different Kinds of Community Engagement?

Community engagement can take many forms, such as advocating for others, volunteering, or creating projects like a community garden. It also involves building long-term, trusting relationships within the community to help prevent disease and promote public health. The International Association of Public Participation describes community engagement as a spectrum, from basic outreach to shared leadership. More local involvement means more communication, trust, and [impact](#).

What Is the Tiered Model of Community Engagement?

A model for community outreach that prioritizes collaborations across anchor partners, or large community organizations that have established, trusted relationships with smaller, local community-based organizations and with the community to promote shared goals. In this model, anchor partners support local organizations in guiding them through the steps to carry out public health research programs.

The COVID testing programs achieved their goals using a **tiered model** of community engagement. In this model, community, public health, and academic partners, along with local community members meet regularly to design the projects’ goals and processes together.

These programs also connect directly with community leaders and organizations (e.g., local groups and clubs, fire departments, churches, schools) to ensure that the program is listening to community voices, and to spread the word about the programs and encourage participation. The tiered model of community engagement aims to build authentic partnerships through shared power, expertise, and program co-design in the hopes of addressing issues through meaningful, fair, and long-lasting collaborations.

Why Does Community Engagement Matter?

Communities actively engaging in local issues are better prepared to handle complex problems. Community engagement is essential for:

1) **Setting a Common Agenda**

Engaging diverse community members ensures that all viewpoints are heard. When communities agree on a program's goals and plan, participation and success are more likely.

2) **Designing and Delivering a Successful Program**

Community members know their own needs best. Involving them before, during, and after the program's design and delivery improves its reach and impact.

3) **Promoting Readiness for Change**

Local collaboration builds trust and helps the community understand the reasons behind program decisions. Trusted partners can help educate the public on local health issues and make them more comfortable with change.

4) **Navigating Ethical Considerations**

Receiving community input helps you understand and address local **ethical considerations** and ensure program activities are culturally appropriate.

5) **Building Lasting Relationships**

Strong relationships built on trust and respect encourage long-term collaboration and keep the program running.

6) **Gathering Feedback**

Feedback from participants can help tailor the program to meet community needs, which supports a smoother rollout, program participation, and staying true to the program's intended goals.

7) **Expanding Reach**

Partnering across diverse organizations (e.g., community-based, faith-based, clinic-based, academic, public health agency) with existing social networks can expand the program's reach.

8) **Benefiting Populations Served**

Community engagement can increase interest in and representation in health research as well as access to medical services. Building relationships with community members can also help people recognize that their voices matter and, in turn, boost self-esteem.