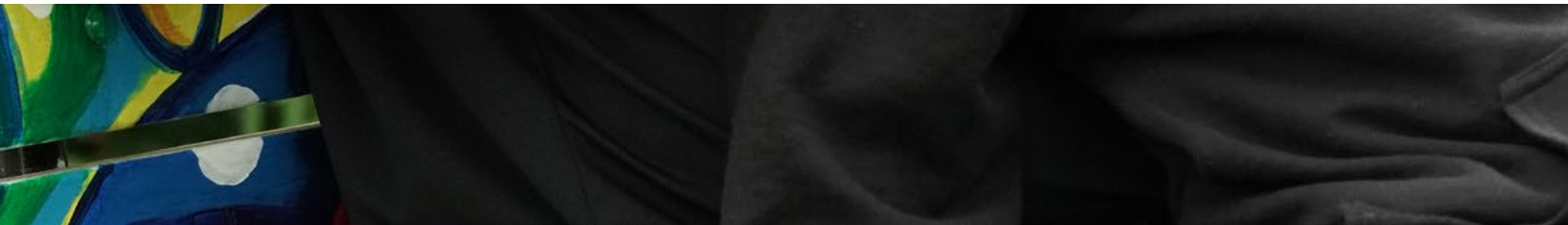




# Launching and Conducting the Research Program



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## KEY POINTS: BUILDING THE PROGRAM FRAMEWORK

- Create an onboarding process for program partners to understand goals and expectations.
- Combine research program events with existing community activities to boost attendance.
- Gather real-time feedback to adapt and improve the program.
- Regularly update partners on progress, challenges, and the research program's impact.

## TOOLS, TEMPLATES, AND RESOURCES

- [Workflow for Onboarding Partners to a Community-Engaged Research Program](#)
- [Social Media Platform Comparison](#)
- [Community Partner Feedback Survey](#)
- [Photo and Video Consent Form](#)

## Orienting Partners

Creating an onboarding process for new program partners is helpful to ensure they are well-prepared to support the research program. While partners who have already signed on should have a general understanding of the program's purpose and their role, hosting an orientation can help them learn key program details, such as program processes and procedures. If the research program includes partners who are not fluent in English, consider including oral interpreters and translated materials as part of the orientation.

Typically, the anchor partner or an operations staff member delivers the orientation. Choose a format that best aligns with the research program's goals—virtual, in-person, or a combination. Offering multiple sessions at different times (e.g., weekdays vs. weekends, day vs. evening) can provide flexibility and increase participation. A representative from each program partner should attend, as they can share the information with other volunteers.

Diverse program partners from the community, public health agencies, academic institutions, and other settings bring valuable local knowledge and expertise. They often have experience organizing outreach programs, so orientations should allow partners to share what kinds of outreach strategies have worked in the past.

## REAL-LIFE EXAMPLE

**One community-engaged research program hosted one-hour virtual orientations for program partners. Sessions were held at various times to accommodate different schedules. Partners needed to complete the orientation before receiving supplies to distribute within the community. For those unable to attend live, the program provided a recorded session. Additionally, guides, templates, toolkits, and FAQs were shared on the program's website for partners to access anytime.**

Consider covering these topics, along with any other program-specific information as part of the onboarding process and program orientation:

- Determining how, when, and how often the team will meet
- Partner responsibilities at each program stage
- Obtaining and managing program supplies
- Tracking and reporting metrics
- Engaging with community members
- Data collection requirements
- Participant responsibilities and answering participant questions
- Program tools, resources, and materials
- Publicizing the program, including sharing personal stories
- Handling diverse viewpoints (e.g., religious, political) and addressing misinformation
- Frequency and method of program updates
- Who to contact for support or questions



Learn more about onboarding in the [Workflow for Onboarding Partners to a Community-Engaged Research Program Initiative](#).

## Distributing Research Program Supplies

Depending on the research program, supplies can include informational literature, diagnostic tests like those used during the COVID pandemic, information about participation sites in the community, or other materials. Determining how much supplies each program partner will need can be tricky. If partners run out, the research program may be interrupted. On the other hand, redistributing unused materials can create logistical headaches. To avoid these issues, it is essential to have a solid resupply plan, so partners do not over-order.

For programs where partners distribute materials to community members, each partner should consider the number of people they typically serve. It is best practice for organizations to request supplies for about 30% to 50% of their total reach. Additionally, planning around the number and size of upcoming events can help avoid supply issues.

### REAL-LIFE EXAMPLE

**Challenges and surprises will likely occur despite thorough planning. In the SYCT program, supplies were shipped via FedEx but transferred to the US Postal Service upon reaching the community. This created issues, as the local Postal Service did not have the vehicles or staff to handle the large volume of boxes sent. Instead of doorstep delivery, recipients were called to pick up their supplies from the post office, causing confusion and concern. Eventually, one program partner rented a U-Haul to collect and hand-deliver the supplies. This experience highlights the importance of committed partners, strong communication, backup plans, and adapting when challenges occur.**

Key supply considerations:

- **Training and agreements:** Partners should complete their onboarding requirements, including orientation, before receiving program supplies.
- **Supply logistics and storage:** Inform partners about storage and delivery requirements. For example, some supplies may need large trucks, a loading dock, or special handling during delivery. Others may require clean, dry, temperature-controlled storage with proper security.
- **Inventory check:** Partners should inventory supplies to make sure they match the requested quantities.

Obtaining, storing, and tracking supplies can be very challenging for large-scale public health research programs.

Here are some steps to help the supply and distribution process go smoothly:

1. Know the financial rules and requirements outlined in the program's grant
2. Find supply vendors that meet quality standards and delivery timelines as early as possible
3. Get details about supplies, including the size, weight, and number of boxes or pallets
4. Choose a storage location that fits size, security, and temperature regulation needs
5. Make sure delivery trucks meet the warehouse's specifications (e.g. loading dock, dolly, hours of operation)
6. Assign a local community member to manage and track deliveries
7. Determine if one or multiple deliveries will be needed
8. Track all deliveries and check inventory upon receipt
9. Set up a process for program partners to get their supplies, either through delivery or pickup, for both initial receipt and resupply
10. Plan a distribution schedule that accounts for weekends, holidays, school events, and large gatherings
11. Monitor distribution to know when/if resupply is needed
12. Check expiration dates on supplies regularly, if applicable
13. Create a plan to return materials and supplies when the program ends

## Promoting the Program

Informing the community about a public health research program is vital for its success. Once a communications plan is in place, it is time to implement it.

### Announcing Program Launch

The research program's launch announcement should spark interest, generate excitement, and showcase local support. This is a great opportunity to connect with local media, especially community-owned news outlets, for example, local newspapers, Black-owned media, or Spanish-speaking radio stations. Getting endorsements from trusted community figures like local government officials, religious leaders, and school representatives can build trust and show the program's value.

Launch announcements can take various forms, such as press releases, public service announcements, social media campaigns, live events, or a combination of these. Work with your partners and tailor the approach to reach the research program audience best.

Tips for a successful launch announcement:

- Pick a launch date and notify local media in advance.
- Consider providing partners with a toolkit with shareable messages, graphics and signage, social media hashtags, and customizable templates they can use to help spread the news.
- Be mindful of scheduling. Planning a launch event can take weeks or even months, especially when coordinating the schedules of community leaders. Make sure to budget time for unforeseen delays.

## Setting Up Social Media

Decide whether to create new social media accounts or use existing ones to promote the research program. New social media accounts (on platforms like TikTok, Facebook, X, Instagram, etc.) allow for program-specific messaging but may struggle to gain followers quickly. Using established partner accounts with an existing audience can be more effective, especially for short projects. Managing fewer accounts also saves time and resources. Carefully weigh these pros and cons to determine what is best for the program.



Use the [Social Media Platform Comparison](#) to help choose platforms for your program communications.

## Promoting Events and Ongoing Communications and Dissemination

Volunteers and program partners play a crucial role in outreach. Highlighting personal stories, quotes, and images from community members can boost engagement as messages work best when people hear them from their friends, neighbors, and trusted leaders. In-person events within the community can be a great way to reach people.

Communication among team members must be clear for effective event promotion. Establish a system for sharing updates between community members and research program team members.

### REAL-LIFE EXAMPLE

**The YMTT program team crafted simple messages for Promotoras (Spanish-speaking community health workers) and volunteers to create flyers and talking points that they delivered to the public at community settings and events. The team crafted messages in Spanish from robust conversations with Promotoras during program trainings. The messages were then translated into English. This “reverse” practice heightened the partners’ sense of agency and contribution. The Promotoras also reviewed much of the text for the program materials to ensure it was clear and accessible to those with lower literacy levels.**

## Evaluating and Adapting Communications

Assess the communications campaign's performance metrics regularly and adjust strategies as needed. Digital media offers near real-time analytics, allowing teams to quickly identify what is working and what is not. Meet with team members to understand if everything is going as planned and to learn what is or is not working for them. Informal check-ins can help to provide information that streamlines processes.

### REAL-LIFE EXAMPLE

**Mpox program players played a crucial role in developing a campaign for a study trying to better understand the infectious Mpox virus and connect communities with resources for treatment and prevention. The study team met regularly with program partners who suggested purchasing ads on dating apps targeting the LGBTQIA+ population. The partners knew the apps to be effective in reaching their communities. This approach proved to be highly successful, generating significant engagement and participation in the Mpox Study.**

## Organizing Program Sites and Events

Local sites and events are the backbone of public health research programs, providing direct services to community members. Program partners from throughout the community are essential in this effort—they serve as the program's representatives and drive its success. Many community-based organizations have experience hosting outreach events, but a public health research program or health crisis can introduce new challenges.

### Sites vs. Events

Program delivery can occur at existing community sites, such as health clinics, community centers, parks, schools, or other community gathering places or through events. Sites operate on a regular schedule, while events happen during a specific, limited timeframe. Depending on the program and community, one or both approaches may be ideal.

Combining program events with existing community activities (e.g., vaccination clinics, voter registration drives, food distribution) can boost attendance while providing other services. If local school districts and community centers are allowed to include research program events in their newsletters, this can be another way to keep community members informed.

Other examples of Program events:

- Community vendor events
- Craft fairs
- Trade shows
- Expos/Festivals
- Pop-up Markets/Farmers Market

Collaboration with the communications team is key when planning site locations, hours, and events. They will help ensure this information is posted publicly and let community members know how they can participate. Given the effort invested in organizing program activities, maximizing turnout is critical.



## Preparing Sites and Events

Follow these steps to effectively set up research program delivery:

### 1. Determine Site Hours and Staffing

- Set consistent operating hours. Offer as many hours as possible to accommodate those with school or work commitments.
- Publicize hours and updates. Work with the communications team to post site and event details on the program's website, partner networks, and social media. Keep information current, including cancellations or out-of-stock notifications. Consider email updates to those on mailing lists.
- Train volunteers. Identify training needs and establish a training schedule along with a clear check-in and check-out process. Make sure all staff know who to contact for support or questions.

### 2. Set Up Delivery Stations

- Choose a suitable location. Identify a welcoming space for research program activities. Consider outdoor setups.
- Use clear signage. Ensure signs guide participants to the correct location.
- Provide translated materials for those who may not be fluent in English.
- Prepare materials and equipment. Have all necessary materials on-site, and allow time for setup.
- Encourage safe practices such as wearing face masks and hand sanitizing
- Manage participant flow. Create a layout that minimizes crowding. Innovative setups, such as drive-thru events, can adapt to specific circumstances.

### 3. Be Flexible

- Public health research programs often require on-the-fly adjustments.
- Sharing lessons learned is invaluable and helps refine future program activities, as described in later sections.

## Collecting Data and Monitoring Progress

Monitoring progress through performance metrics is crucial for any project, including public health research programs. Identifying key indicators early on ensures the program stays on track and meets its goals. Metrics might include operational data, like the total number of participants, or health-specific data such as test result percentages.

Be sure to collect data regularly, visualize it clearly, and share reports to maintain accountability and provide support. Start by determining which program metrics are most important and then decide how these data will be gathered and reported.

#### REAL-LIFE EXAMPLE

The YMCF program tracked the number of program partners from across the community who were engaged and also the number of COVID tests distributed to the community. These data were collected through a simple survey. Other helpful metrics included participant demographics and public attitudes on trending health issues.

## Data Visualization

**Data visualization** tools like Tableau or Microsoft Power BI can create dynamic graphs, but simpler tools like Microsoft Excel or PowerPoint, Canva, or Google Data Studio also produce effective charts and reports if advanced software is not available.

Real-time data visualization is an innovative tool in public health. It offers instant performance insights, enabling teams to adjust their strategies as needed. The table below lists examples of useful metrics to monitor on an ongoing basis. Visual dashboards and comparison charts can highlight top-performing partners and those needing more support. Additionally, tracking data completeness helps ensure partners submit accurate and timely information.

Sharing a data dashboard with all team members builds transparency and encourages each partner to see their role in the program’s success. Program partners can view their contributions in real-time and understand the impact of their efforts.

### Examples of Useful Metrics for Visualization and Reporting

Metric	Measurement
Key program-related health outcomes	Counts and %
Number of participants engaged	Count
Number of participants engaged by each program partner	Count
Survey respondents that completed survey	%
Survey respondents that left survey incomplete	%
Demographic breakdown of participants	Counts and %
Geographic location (ZIP code) of participants	Count

#### REAL-LIFE EXAMPLE


Using Microsoft Power BI, the YMCF program team developed an interactive dashboard. The software pulled data from the program’s data collection tools (REDCap, Qualtrics, and Google Analytics). The dashboard allowed users to filter and view real-time metrics like COVID test distribution (by organization, date, and ZIP code), participant demographics, COVID test results, survey completion by age, and reasons for taking a COVID test. This tool provided valuable insights, enabling the team and partners to adjust operations based on live data and track their collective progress.

## Gathering Feedback and Sharing Updates

Sharing feedback across partners and in real time helps the team fix problems quickly and make the program better for everyone. For example, if a partner runs out of supplies, the team can adjust or reschedule events so families aren't left out. Also, when some partners have high turnout, program leads can ask them to share what's working so others can learn and improve too.

Partners across the research program team should maintain regular communication using multiple methods, each tailored to a specific need. The table below outlines several communication methods and considerations for each.


Sharing updates with community members is just as important as gathering their feedback. Community members want to know how the program is progressing and making a difference in their community. Seeing their contributions lead to positive results can be highly motivating.



Check out the [YMTT study summary](#) for more on using participant and partner feedback.

### Methods for Gathering Feedback and Sharing Information

Mode of Communication	Advantages	Disadvantages	Tips
Email	<ul style="list-style-type: none"> <li>Simple to set up</li> <li>Everyone already has it</li> <li>Can establish a regular cadence for updates</li> </ul>	<ul style="list-style-type: none"> <li>Email fatigue</li> <li>Easy for messages to get lost or be ignored</li> <li>Less conversational</li> <li>Requires connectivity</li> </ul>	<ul style="list-style-type: none"> <li>Consider setting up a centralized program inbox that will be monitored</li> </ul>
Other technology tools (e.g., Slack, Facebook Groups/Messenger, Airtable, Microsoft Teams, SharePoint)	<ul style="list-style-type: none"> <li>Speed of communication</li> <li>Open dialogue</li> <li>Available 24/7</li> </ul>	<ul style="list-style-type: none"> <li>Learning curve</li> <li>Adoption hesitancy</li> <li>Requires connectivity</li> <li>May require purchasing a license</li> </ul>	<ul style="list-style-type: none"> <li>Ask the team for their preferences and accessibility to digital tools before expecting them to use them</li> </ul>
Phone calls	<ul style="list-style-type: none"> <li>Widely accessible</li> <li>Encourages open 2-way conversation</li> </ul>	<ul style="list-style-type: none"> <li>Can be more time consuming</li> <li>Dependent upon availability to talk</li> </ul>	<ul style="list-style-type: none"> <li>Train partners to know you will call them and to save your phone number so they don't reject the call</li> </ul>
Face-to-face interactions	<ul style="list-style-type: none"> <li>Shows support and appreciation</li> <li>Builds camaraderie</li> <li>Encourages open 2-way conversation</li> </ul>	<ul style="list-style-type: none"> <li>More time consuming</li> <li>Can be logistically challenging</li> </ul>	<ul style="list-style-type: none"> <li>Don't discount the benefits of getting some face time with your partners when possible</li> </ul>



Refer to the [Community Partner Feedback Survey](#) to generate ideas for survey questions and possible formats.

## REAL-LIFE EXAMPLE

The RADx-UP program operations and communication teams worked together to create a weekly newsletter that kept team members informed. Before launching the newsletter, the operations and communications team designed a template and developed a content and delivery schedule to cover the entire program.

The newsletter featured a variety of content, including:

- A progress thermometer to show distribution milestones
- Visual data on program reach, participation, and impact
- A list of upcoming events with links to the program website
- Photos and videos from recent events\*
- Important reminders
- Ready-to-share social media posts
- Quotes from leadership and community members to express gratitude and encourage participation



Be sure to get permission before using images or videos of a person. See the [Photo and Video Consent Form](#) template.

