



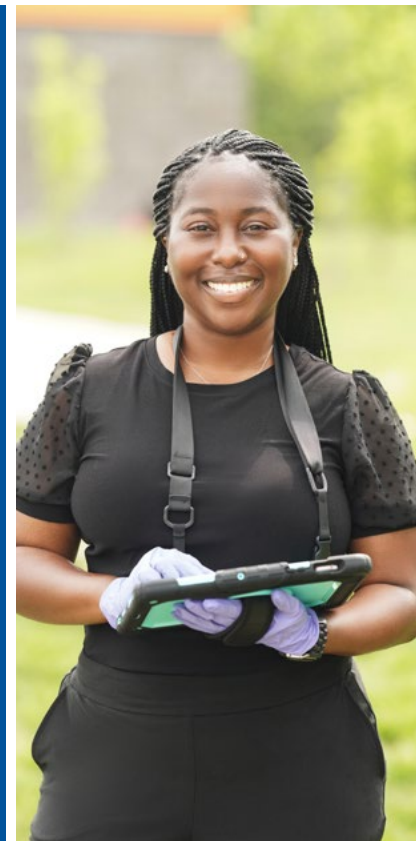
ROADMAP

FOR COMMUNITY ENGAGEMENT



A tool to support effective collaboration and community partnerships to promote the co-design of public health and research programs

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Preface

The Roadmap for Community Engagement is the result of over 4 years of close collaboration and true partnership across community organizations, governmental/public health agencies, and academic researchers in Merced County, CA, Pitt County, NC, and Duke University in Durham, NC. The Roadmap is a tool to support effective collaboration on **community-engaged research programs**. We hope for this resource to be accessible and useful to a wide range of community members, public health practitioners, researchers, and community health advocates. We are eager for your [feedback](#) on ways to improve this Roadmap going forward.

The Roadmap was initiated during the **Say Yes! COVID Test** and **You & Me COVID-Free** public health programs, which developed a toolkit of materials to support community-engaged research in cooperation with the National Institutes of Health (NIH), Centers for Disease Control and Prevention, Quidel (COVID test manufacturer), CareEvolution (a healthcare technology company), partners from the **Rapid Acceleration of Diagnostics-Underserved Population** program and Community Campus Partnerships for Health (CCPH), and research institutions including Duke Clinical Research Institute and University of North Carolina Center for Health Equity Research.

In 2024, the **You & Me: Test and Treat** program, including program partners and teammates from across the community, adapted the toolkit into this Roadmap to help guide community leaders interested in creating and co-leading research programs that support public health and well-being.

All work was funded by the National Institute on Minority Health and Health Disparities at the NIH (4U24MD016258-02). The content is solely the responsibility of the authors and does not necessarily represent the official views of the NIH. **You & Me COVID-Free** was funded through the RADx-UP Coordinating and Data Collection Center and NIH emergency cooperative agreement 1U24MD016258. **You & Me: Test and Treat** is funded by the NIH 1U01MD018294-01. These projects fall under the **You & Me Healthy Program** in support of health access for underserved populations.

We would like to acknowledge the United Way of Merced County and Pitt County Health Department for their collaboration on the Roadmap for Community Engagement. We would also like to acknowledge the participants of **You & Me: Test and Treat** for their contribution to the research underlying this work.

Contents

Preface	2
Glossary.....	4
Introduction	6
About the Roadmap	7
Compass for Project Planning	10
Learning by Example	12
Reviewing Community Engagement Principles	13
About Community-Engaged Health Research.....	15
Answering FAQs.....	16
Forming Community-Engaged Partnerships	19
Planning for Lasting Impact	21
Building to Last	22
Establishing Clear Goals	23
Understanding the Community.....	24
Prioritizing Inclusion.....	25
Adjusting to Change	28
Budgeting and Financial Planning	29
Building the Research Program Framework	31
Partnering With a Community	32
Building a Team	33
Growing Partnerships	34
Establishing Goals and Metrics	35
Understanding Research Requirements	36
Determining Data Needs	37
Creating a Communications Plan, Messages, and Materials	40
Launching and Conducting the Research Program	43
Orienting Partners	44
Distributing Research Program Supplies	45
Promoting the Program	46
Organizing Program Sites and Events	48
Collecting Data and Monitoring Progress.....	49
Gathering Feedback and Sharing Updates.....	51
Reflecting and Closing the Research Program	53
Thanking Partners	54
Reflecting	55
Sharing Findings and Results	56
Maintaining Relationships.....	56

Glossary

Term	Definition
Anchor partner	A trusted local organization or group that can support community-engaged public health research programs. They may connect the program with the community, support planning and decision-making, and ensure the program is respectful, helpful, and meaningful to the people it's meant to serve.
Campaign	A way to tell people about something, get their attention, and encourage them to take action.
Civic organization	A volunteer service group or association that operates for educational or social welfare purposes. Their goal is to improve the quality of life for others, usually through the volunteer efforts of its members.
Clinical research	Studies that help researchers learn more about disease prevention, new treatments, and ways to improve health and advance medical care.
Communication channel	A way to send a message to its intended audience, such as phone calls, text messages, emails, television, newspaper, radio, and social media.
Community-based organization	A public or private nonprofit organization that is representative of the community it serves. It provides services or other assistance to those within a community or segment of the community.
Community engagement	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-engaged research program	The process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations in an organized process of collecting information to answer questions, solve problems or better understand topics that relate to public or community health.
Community partnerships	Partnerships from across the community, including community members, non-profit organizations, governmental/public health agencies, and academic institutions, to support the planning, implementation, evaluation and dissemination of a community-engaged research program.
Cultural Competency	The process of learning how to understand, respect, and work well with people from different cultures.
Cultural Humility	Taking time to think about your own background and how your thoughts or actions might be shaped by personal beliefs or biases. It also means being open to learning about other cultures and trying to understand and respect differences.
Cultural and Linguistic Sensitivities	Having an awareness and respect toward people's different cultures and languages. Understanding how culture affects the way people talk, think about health, and make decisions
Data visualization	The display of information in the form of a chart, diagram, picture, etc.
Ethical considerations	Important questions about what is fair when making decisions in a public health research program. These include respecting people's rights, protecting their privacy, and being honest.
Health Insurance Portability and Accountability Act (HIPAA)	A federal law that protects a person's sensitive health information from being disclosed without their consent or knowledge.
Metrics	Numbers or facts that help you measure how well something is working.

Term	Definition
Mpox Study	A study that aimed to explore barriers to mpox treatment and vaccination, and evaluate stigma on individuals diagnosed with or at risk for mpox.
Personally identifiable information (PII)	Information about health status, provision of healthcare, or payment for healthcare that can be linked to a specific individual.
Public health program	Actions and services to protect and improve the health of people and communities.
Public health research program	An organized process of collecting information to answer questions, solve problems or better understand topics that relate to public or community health.
Rapid Acceleration of Diagnostics-Underserved Populations (RADx-UP)	A program funded by the National Institutes of Health to improve access and use of COVID testing in communities of underserved and vulnerable populations.
Community Outreach	The process of finding the right people to join a group, support a cause, or take part in activities.
Regulated entity	An organization or company that, by law, must follow certain rules or policies set by a regulatory authority. Examples include banks, insurance companies, and pharmacies.
Research	An organized process of collecting information to answer questions, solve problems, or better understand a topic. Academics, public health professionals, community organizations and community members can lead/co-lead research.
Roadmap	The Roadmap for Community Engagement, a tool to support effective collaboration on community-engaged research programs.
Say Yes COVID Test! (SYCT)	A community-engaged public health research program that provided free at-home COVID tests to underserved communities.
Tiered 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.
You & Me COVID-Free™ (YMCF)	A community-engaged public health research program that provided free at-home COVID tests to underserved communities.
You & Me Healthy™ Program	This collection of community-engaged research projects, public resources, and a Registry in support of health access for underserved populations. All You & Me Healthy™ projects address health challenges that are priorities for the communities they serve.
You & Me Healthy™ Registry	A virtual community of participants, local community groups, and clinicians working together to select research topics that are important to the community, and develop and conduct research studies that flexibly respond to changing public health needs across the United States.
You & Me: Test and Treat (YMTT)	A public health research program that used tiered engagement and an earlier version of the Roadmap for Community Engagement to help increase access to free, rapid, at-home COVID testing for residents of two US counties.
Youth Empowered Self-Care (YES)	A mental well-being intervention that promotes access to park- and community-based recreation programs among minoritized and low-income youth.



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.



About Community-Engaged Research



About Community-Engaged Research

KEY POINTS: ABOUT COMMUNITY-ENGAGED RESEARCH

- Community-engaged research addresses ways to promote health and well-being by working collaboratively with community members on public health research programs.
- Community-engaged research involves collecting information to answer questions, solve problems or better understand topics that relate to public or community health.
- A successful community-engaged research program relies on partners with many different perspectives, expertise, and skill sets.
- Community-engaged research includes processes that ensure a program gets important feedback at every step.

TOOLS, TEMPLATES, AND RESOURCES

- [NIH Clinical Research Trials and You](#)
- [Why Research Matters Brochure](#)
- [Preparing for Community Partnerships Checklist](#)

Answering FAQs

What is Community-Engaged Research?

Community-engaged research addresses ways to promote health and well-being by working collaboratively with community members on public health research programs. Community-engaged research involves collecting information to answer questions, solve problems or better understand topics that relate to public or community health. It can focus on many different things, such as learning the causes of illness, developing new therapies, improving health policies, or addressing disparities in care. It can also address why some community members have lower access to health, well-being, and resources, and how to change this for the better. Gathering valuable knowledge through community-engaged health research can help guide public health research programs and address health challenges that are important to community members.

Example Health Challenges Addressed with Community-Engaged Research


Chronic diseases	Long-lasting illnesses like diabetes, high blood pressure, heart disease, or obesity.
Infectious diseases	Illnesses that spread from person to person, such as the flu, COVID, or tuberculosis.
Mental health concerns	Stress, anxiety, depression, or trauma that affect groups of people.
Substance use	Problems with drugs, alcohol, or tobacco.
Housing and Food Security	Access to shelter, transitional housing, and supportive services. Low-income housing: Availability, affordability, and quality of housing. Food access and disparities: Proximity to grocery stores, affordability of healthy food, and availability of culturally appropriate nutrition.
Environmental problems	Dirty air, unsafe water, or pollution in the neighborhood. Climate-environmental disaster impacts.

Access to community resources	Proximity to greenspaces, connected and well-maintained sidewalks, public libraries, places of worship, education, community programs (e.g. youth afterschool; adult literacy), recreation facilities.
Transportation	Access to a safe, accessible, well-maintained and reliable transportation system.
Maternal and child health	Issues like not enough prenatal care, low birth weight, or poor nutrition for children.
Access to healthcare	Trouble getting care because of cost, lack of transportation, or not enough local doctors or clinics.
Health inequalities	Differences in health between groups of people, often linked to race and ethnicity, income, or where someone lives.
Access to information	When people don't get clear or reliable health information like not knowing about vaccination clinics, not understanding food labels, finding false health advice online, or not having internet access to look up resources or join telehealth visits.

Why Is Community-Engaged Health Research Important?

Community-engaged health research can improve individual and community well-being, save lives, and improve public health outcomes. It can also help to:

- Improve understanding and awareness of health issues
- Highlight community needs and perspectives
- Enhance the quality of care
- Develop new treatments or interventions
- Reduce disparities, stigmas, and fears associated with health research



Learn more about why research is important in the [Why Research Matters Brochure](#).

Who Runs Community-Engaged Health Research?

Many different people and groups can work together to find ways to make people healthier. These include:

- Community-based organizations
- Researchers and scientists
- Healthcare professionals like doctors, nurses, and public health experts
- Public health agencies
- Large government agencies like the Centers for Disease Control and the National Institutes of Health
- Private companies

Each member of a community-engaged research team helps advance the program using their expertise.

Who Pays for Community-Engaged Health Research?

Community-engaged health research can be funded through many different sources, such as:

- Government grants
- Private foundations
- Corporate sponsors
- Academic institutions

A research program may be funded by one or a combination of these sources.

What Does Community-Engaged Health Research Look Like?

Some of the most common types of community-engaged health research include:

- **Basic research:** focuses on understanding biological processes.
- **Clinical research:** involves human participants testing potential treatments to solve health challenges.
- **Behavioral research:** studies human behavior and how social influences impact health.
- **Health services research:** aims to improve healthcare delivery, accessibility, and efficiency.
- **Social determinants of health research:** focuses on conditions in the environments where people are born, live, learn, work, play, worship, and age, and their impact on health and well-being.



Learn more about clinical trials on the website [NIH Clinical Research Trials and You](#). Learn more about the US Department of Health and Human Services Healthy People 2030 initiative [here](#).

How Long Does Community-Engaged Health Research Take?

Program length varies depending on the type and extent of the research, access to funding and resources, strength of the partnerships, and community trust. Some studies may finish within a few weeks, whereas others will last years or even decades.

Forming Community-Engaged Partnerships

A successful community-engaged health research program relies on partners with many different perspectives and skill sets, from grassroots organizers to local non-profit organizations, to government officials, to academic researchers. Any type of organization can start the partnership, and the ability to find funding, staffing, and support will depend on the strength of the partnership. This section explores how to create partnerships with an anchor partner and an academic or public health partner.

Identifying an Anchor Partner

The anchor partner is an organization that can champion community-engaged health research programs, manage and coordinate program activities, and recruit additional partners. Identifying an anchor partner may be required for some funding sources such as grants. If funding is not yet secured, their partnership may help guide the process to seek funding.

Depending on the program, anchor partners can take on different roles. The three most common program models are:

1. **Crisis Management Model:** In the crisis management model, the anchor partner is a **regulated entity** (e.g., health department, military unit, Office of Emergency Services, law enforcement) with full-time staff who manage or resolve major crises or community issues.
2. **Grassroots Model:** In the grassroots model, the anchor partner is usually a contracted community-based organization with experience managing similar programs. They usually use a team approach to lead efforts. Partners may include faith-based groups, nonprofits like the American Red Cross, and **civic organizations** such as Rotary clubs or parent teacher associations, with paid and volunteer staff.
3. **Hybrid Model:** In the hybrid model, the anchor partner can deliver most of the program through its own resources. The organization will also recruit other partners from its network to contribute to the effort.

REAL-LIFE EXAMPLE

United Way of Merced County served as the anchor partner for YMCF. Their strong reputation, experience managing community-wide projects (including food distribution, job training, rapid COVID testing, tax preparation, and more), financial resources, and capable bilingual staff made them well-suited to support the program. Their ability to respond quickly to challenges like bad weather or shifts in demand was critical to the program's success.

Each community may require a different model, so programs should adapt to local needs. Ideal qualities of anchor partners:

- A respected leader or agent of change
- Known as the go-to person or organization for trusted information
- A track record of bringing about positive change
- The capacity and expertise to address significant community challenges
- Strong partnerships and connections to other organizations (e.g., food distribution programs, government agencies, small businesses, large employers, faith-based organizations, school districts)

When reaching out to potential anchor partners, it is helpful to:

- Share a program overview including goals, funding and budget, compensation, timeline, benefits to the community, and role expectations.
- Introduce program specifics, send a one-page brief via email, and then review a program overview slide deck via videoconference.
- Use informal meetings or phone calls to build rapport.

It is helpful to outline program elements before reaching out to potential anchor partners, but plans do not need to be set in stone. Partners from across the community can offer valuable insights when designing and running a public health research program. They understand local demographics and cultural norms and can connect to key community leaders.

Working closely with program partners from across the community and throughout the entire process ensures a community-engaged research program gets important feedback at every step. Setting up a clear communication process early on will help build a strong, lasting partnership.



Use the [Preparing for Community Partnerships Checklist](#) to review steps for successful collaboration.

Identifying an Academic or Governmental/Public Health Agency Partner

Academic and governmental/public health agency partners can offer research expertise, funding assistance, and support in managing complex programs. They will also understand applicable laws and regulations and have specialized data analysis, project management, and communications skills.

To find the right partner:

- Identify local organizations with relevant expertise and find departments within these organizations that are most aligned with program goals.
- Consider the program's focus. For example, a vaccine program might work best with a medical school or county health department, while a water filtration project could be better suited to an engineering school or local department of water quality.
- Reach out to local advisory boards or professional networks that can create connections to different groups.

Be aware that academic and governmental/public health agency partners may have added processes like legal reviews or publication policies, which could affect program operations and timelines.



»»»» Planning for Lasting Impact



Planning for Lasting Impact

KEY POINTS: PLANNING A RESEARCH PROGRAM FOR LASTING IMPACT

- Build a research program design by understanding community needs and challenges, and aligning program goals with local priorities.
- Design programs to be flexible, allowing adjustments based on observation, feedback, and expansion.
- Prioritize inclusion and identify barriers.
- Identify resources, including funding, personnel, and partnerships, to ensure the program can reach its short-term and long-term goals.
- Establish measurable benchmarks to ensure consistent progress and alignment with the program vision.

TOOLS, TEMPLATES, AND RESOURCES

- [Program Planning Worksheet](#)
- [SMART Goals Template](#)
- [Community Pulse Survey](#)
- [SWOT Analysis Template](#)


Building to Last

Public health research programs aim to improve community health and well-being, but their impact should last beyond their initial implementation. Designing for sustainability ensures that the program’s benefits will continue even after program funding or resources are no longer available. To achieve lasting benefit, public health teams must build a program that can adapt to changes, integrate into existing systems, and empower the community to take ownership over time. They must also create partnerships that can carry the program forward as different needs arise or funding fluctuates.

The following steps may assist in building a program to last:

1. Develop an initial vision
2. Brainstorm ideas with partners and ask what kind of program they would like to create
3. Identify steps needed to bring the vision to life
4. Maintain a respectful relationship with the partners in their shared vision and values
5. Continue to review goals and adapt to new opportunities and conditions
6. Share tasks equitably and seek new funding sources and opportunities
7. Make goals reasonable, measurable, and attainable

This section outlines key considerations when designing a program that is effective, flexible, and built to last. Public health teams can create programs that have lasting impacts by focusing on long-term planning, accessibility, and cultural relevance.



Consider using the [Program Planning Worksheet](#) to document and begin organizing program plans.

Establishing Clear Goals

By first defining goals, teams can shape the research program's design to support long-term impact. Knowing what the program aims to achieve can help guide decision-making, including what resources, partnerships, and systems are needed to sustain program impact after initial funding runs out or other challenges occur.

Effective Goal Setting

- **Be specific.** Set goals and deadlines that you can easily measure. For example, "Determine methods to support 100 local families in building healthy habits; Engage 50 children in regular wellness activities by the end of this year and determine the impact on childhood healthy weight by next August."
- **Be realistic.** While it is good to aim for lofty goals, you should also ground the program's goals in its available resources and capacities. Ex. Partner with two local schools and one community center to host wellness activities, based on available staffing and budget.
- **Be precise.** Define short- and long-term milestones with deadlines for achieving goals. This will help maintain motivation and accountability. Use benchmarks at regular intervals (e.g., quarterly) to track progress and assess impact; Ex. Conduct weekly zoom meeting check-ins with parents and guardians. Identify fitness programs or ways to teach youth how to meal prep with a parent.
- **Be collaborative.** When setting goals, work with community members, partner organizations, and funders to determine collective priorities. Ex. Community members could be parents and guardians of children between the ages of 5-12 or grades K-6. Partnering organizations could be the school district or local schools, local funders or food banks. Community centers, etc.



To help develop and refine your research program goals, consider using the [SMART Goals Template](#).



Understanding the Community

To support sustainability of a community-engaged research program, teams must thoroughly understand the environment in which they work. This involves assessing the social, economic, cultural, and political dynamics influencing the program. This context helps ensure that program interventions are relevant, responsive to local needs, and adaptable to any challenges that may occur. People are more likely to participate in research programs that address their needs. Knowledge of the community shows respect for local partners and builds trust, a critical part of long-term program success. Additionally, understanding the community allows research programs to make the most of existing strengths, like local skills and systems, while addressing potential barriers, such as limited funding or systemic inequities.

Community Analysis

Follow these steps to gain an understanding of the community:

- **Find partners.** Identify community leaders, government agencies, or local organizations that may help reach shared research program goals. Determine how existing partnerships can support the program and collaborate with new partners and organizations.
- **Engage partners through active listening.** Create opportunities to listen to community voices. Seek and gather input from community leaders to learn about the community's needs, values, and culture.
- **Consider cultural norms and practices.** Recognize local traditions, values, and customs that may influence research program design and acceptance. These may include language barriers, religious influence, or social roles. Adapt your approach to ensure it is considerate and respectful of the community.
- **Collect data to understand and describe the community.** Programs can learn more about the community by collecting data on age, income, education, and health demographics. Also consider social determinants of health, such as food insecurity, housing, transportation, and other barriers to health and well-being. Conducting surveys, interviews, or focus groups can help you understand community perspectives and needs, and determine what are current challenges to health and well-being in the community that can be measured to assess program impact.



Refer to the [Community Pulse Survey](#) for a way to gather useful data from the community quickly.

REAL-LIFE EXAMPLE

When supporting underserved populations, it is important to understand how the program may affect other populations within the community. For example, a lead partner recalled when an organization outside the area offered food service only to specific groups within their community. This caused a backlash, forcing the organization to stop service entirely. The problem was not *who* the program served but how eligibility was conveyed to the community. This cautionary tale underlines the importance of local community input on program implementation and perceptions. When planning, consider the entire community, even if a goal is to serve a specific subset of the population.

Prioritizing Inclusion

By designing a program to reach and serve everyone, regardless of background or circumstances, we can promote long-term impact, enhance trust, and increase participation and engagement.

Language Barriers and Access to Translation Support

To foster meaningful community partnerships, address language barriers upfront by providing translation and interpreter services for those who are not fluent in English. Interpreter and translation are distinct services that require different skill sets and specialized training. Interpreters work with spoken language, helping with real-time communication, while translators work on written materials. Both roles demand advanced proficiency in two languages and cultural competence to convey complex ideas, including professional terminology, values, and beliefs, accurately.

When planning program partnerships, allocate funds for hiring professional interpreters and translators. Community organizations often have connections to trusted language service providers experienced in supporting collaborative, multilingual environments.

Be aware that bilingual staff within universities or community organizations may not always have the fluency or training needed for the specific communities served. For example, translating word-for-word, without capturing the nuanced meaning, can hinder clear communication. Additionally, bilingual fluency does not automatically imply bicultural understanding, which is crucial for culturally sensitive communication.

Communication considerations for professional presentations and meetings:

- Plan enough time so that presentations and materials can be translated
- Give time for the interpreters to ask questions and prepare for the presentation
- Use plain English and avoid technical jargon, acronyms, and idioms, e.g., where the rubber meets the road
- Do not speak too rapidly
- Spell out the meaning of acronyms, if they are necessary
- Speak using descriptive language, and avoid using long and convoluted sentences
- Permit the interpreter to clarify information
- Take pauses to check in with the interpreter and make sure they are keeping up

Consider the types of interpreting available when planning meetings or events:

- **Consecutive interpreting:** The speaker pauses to allow the interpreter to relay the message in the other language. This method requires no special equipment but doubles the time needed for communication.
- **Simultaneous interpreting:** Using special equipment (microphones, transmitters, receivers, and earphones), interpreting occurs in real time without interrupting the flow of conversation. Participants can engage directly despite language differences. This type of interpreting is challenging for someone without experience. It also requires additional time and planning to check, distribute, and pick up the equipment. It is best to hire a company that has the equipment and expertise to use it.
- **Remote interpreting:** A valuable option for online meetings that adapts interpreting equipment and practices to virtual settings.

While these services are vital tools for language access, creating a truly multilingual and inclusive space involves more than language services. Consider the physical setup of meeting spaces, program design, and other logistical details to ensure all languages and cultures are respected and can coexist equitably.

By thoughtfully addressing language barriers through professional services and inclusive planning, you can enhance participation, foster mutual understanding, and build stronger, more equitable collaborations.

Geographical and Physical Barriers

Making a public health research program physically accessible means everyone, including those with disabilities, limited mobility, or geographic barriers, can fully participate in program activities. Without addressing these barriers, a program may exclude populations and undermine its impact.

To design a physically accessible program:

- Host events at accessible and familiar locations like community centers, public libraries, parks, or recreational facilities
 - Avoid locations that might feel exclusive or intimidating, like hospitals, government buildings, or organizations associated with a particular group
- Consider if public transportation can reach event venues and whether these places have ramps, elevators, or accessible restrooms
- Offer virtual or mobile activities, satellite locations, or in-home visits to better reach remote populations
- Schedule program activities at various times to accommodate work schedules, caregiving responsibilities, or other commitments
- Provide food, childcare, or other supportive accommodations when possible
- Write materials in large-print and use high-contrast color schemes for better readability

Financial Barriers

Financial barriers, such as fees or indirect costs (e.g., transportation), can prevent populations from participating in public health research programs. Considering and finding solutions to these challenges can help increase participation and ensure program sustainability.

Overcome these obstacles by including strategies to:

- Cover costs associated with participation, including transportation, childcare, or any equipment needed for program activities
- Offer the program at no cost
- Compensate all participants appropriately for their time and effort

Cultural Barriers

Awareness and acknowledgment of cultural barriers help program teams to be considerate of differences within the community. Cultural norms or values may influence how community members perceive and engage with health programs. Understanding and respecting these differences is important to building trust and communicating effectively.

Cultural barriers may include:

- Historical distrust
 - Patterns of exclusion and mistreatment are a part of research history. Transparency and open communication help build trust in the program.
- **Cultural competency and sensitivity**
 - Respect and value community members' diversity and cultural differences by including diverse voices and perspectives in program design and implementation.
 - Approach conversations with:
 - Cultural awareness
 - Open-mindedness
 - Respect
 - Adaptability
- **Cultural humility**
 - Be aware of how privilege may impede connection with community members. Acknowledge the program's blind spots and work with the community to reduce these gaps.
 - Consider personal biases and try to be open to learning about other cultures and respecting different beliefs.
- Power imbalances
 - Create welcoming, non-judgmental spaces that allow for all voices to be heard and acknowledged. Shared decision-making helps empower community members to provide information and resources that can help strengthen the program.



Digital Barriers

Programs can overcome digital barriers by taking steps to address gaps in digital literacy. Digital literacy means the ability to use digital tools, technologies, and platforms to find, understand, and share information. In public health research programs, promoting digital literacy or offering alternatives to digital tools helps make sure everyone can participate and access resources.

Some communities may not have reliable internet or access to digital devices, making it hard to engage with the program. Participants might also feel unsure about using advanced digital tools or sharing their data online. These challenges could cause people to feel overwhelmed and stop participating.

Consider how the population served feels about the digital tools they are being asked to use. For example, older adults or people with disabilities might find digital tools harder to use. To ensure an inclusive program:

- Provide workshops and training on how to use digital tools or platforms
- Give clear instructions for any digital requirements
- Offer alternatives, like in-person meetings or paper-based materials
- Explain how participants' data will be used, stored, and kept safe, or discarded
- Work with local organizations to understand the population's digital literacy

By considering a community's digital literacy, a public health research program can be more accessible and welcoming.

REAL-LIFE EXAMPLE

The YMTT program used QR codes on materials to help enroll participants and share information about the program. However, many Spanish-speaking participants were unfamiliar with QR codes or how to use them, including the community health workers (Promotoras) tasked with sharing the information. The local partners trained the health workers how to use QR codes. The health workers were then able to bring this knowledge to the rural communities and farm workers they served. What started as a barrier became a learning opportunity for the health workers and communities. This example highlights the importance of community input on how to implement a program and how training and outreach can promote program success.

Adjusting to Change

Flexibility and adaptability are critical parts of any public health research program. A program that can adjust to changing circumstances, evolving needs, and unexpected challenges (such as health crises or policy changes) is more likely to stay effective and relevant. This section outlines key strategies for designing resilient and responsive programs.

Seeking Feedback

Getting and responding to feedback along the way allows programs to stay aware of participants' experiences and needs, which can help you identify issues early and adjust as needed. A program may collect feedback from surveys, focus groups, suggestion boxes, or interviews. It is important to foster a safe and non-judgmental culture where team members and participants feel comfortable sharing their concerns or ideas.

Adapting to Evolving Needs

Sometimes, research programs may need to grow or shrink in response to community needs and shifting priorities. Plan to respond quickly to changes in demand for the program or available resources. A program can adjust its scale by incorporating parts that can be added or removed without disrupting general operations. Programs can also be adapted by adding goals and including additional measures to assess impact of new priorities. Other helpful strategies include training staff in roles that can cover various needs and planning budgets with funds that could address unexpected growth and shifting priorities.

When an organization is going through changes or facing a big decision, it is a good time to use a SWOT Analysis. This method helps you look at:

- **Strengths** – what your team or project does well
- **Weaknesses** – areas that need more work
- **Opportunities** – chances to grow or improve from outside factors
- **Threats** – problems or risks from outside factors



Use the [SWOT Analysis Template](#) to help assess a situation in times of change.

By looking at these four areas, you can better understand the situation. This makes it easier to make smart choices and deal with the challenges that come with change.

Planning for Emergencies

A program can plan for how it will manage disruptions without compromising its overall goals. This may include identifying potential risks like funding cuts, supply chain issues, or natural disasters and developing strategies for maintaining services during these disruptions. Creating a crisis communications plan can help pre-determine chains of command for how crises will be handled and by whom.

Relying on Partners

Partnerships expand a program's resources and provide a support network during times of change. When experiencing difficulties, community organizations, healthcare providers, academic institutions, and others can help sponsor events, donate resources, or provide other key operations.

Consider the following ways to work with partners in making a program more adaptable and resilient:

- **Preparing for change**
 - Program partners can ensure they have the resources, skills, and leadership needed to adapt to emerging needs.
 - Training staff and community leaders on flexibility, resilience, and continuous learning is key to adaptation.
- **Shifting resources**
 - Shifting resources is necessary as community needs evolve. This may mean adjusting how the program receives funding, changing the budget, or exploring innovative partnerships.
- **Piloting program design**
 - Involve partners in testing health interventions on a small scale and use the insights to refine and adapt the research program including the measures that are collected to assess impact before a wider rollout.
- **Sharing leadership**
 - Giving community members leadership roles in program design, execution, and evaluation helps ensure that the research program can adapt and continue to meet the community's needs.

Budgeting and Financial Planning

Thoughtfully managing resources and investing in the right team ensures a program can withstand challenges, adapt to changing circumstances, and maintain its impact over time. This section explores how to plan for changes in finances and staff to support lasting success.

Consider the following tips:

- **Secure multiple funding sources**
 - Seek funding from various sources like government grants, private donations, corporate sponsorships, partnerships with local businesses and nonprofits, and fundraisers so the research program can adapt if one source is reduced or cut.
- **Plan for emergencies**
 - Put some of the budget into unallocated funds to help address unexpected needs, such as a sudden health crisis, shifts in the community, or policy changes. This safety net will allow the research program to continue running without securing new funding immediately.

- **Include partners in financial decision-making**

- Involve community members, program partners from across the community in financial decision-making to ensure the research program uses the money to align with the community's evolving needs.
- Assess how the research program has impacted the community and whether it is reaching its goals. Work with partners to prioritize funding for the most effective activities, ensuring that resources are allocated efficiently and redirected as needed.
- Allow partners to identify opportunities to reallocate funds to new priorities within the research program or develop additional income-generation strategies.

- **Create dynamic financial plans**

- Design financial plans that allow the research program to increase or decrease in size and effort depending on the community's health needs or funding availability.
- Consider testing new initiatives on a smaller scale before committing to a larger size and budget.

- **Think about the future**

- Consider establishing endowments, developing partnerships with stable funders, or creating income-generating activities (such as offering paid services or products) to help maintain research program continuity, especially during funding uncertainty.
- Advocate for policy change that aligns with research program goals and help secure more stable and predictable funding sources, such as government or foundation support.





Building the Research Program Framework

Building the Research Program Framework

KEY POINTS: BUILDING THE PROGRAM FRAMEWORK

- Build partnerships with community leaders or work with a well-connected community-based organization.
- Develop research program goals and evaluation metrics with program partners and use these to track progress.
- Determine what the program is trying to change, and identify ways to measure changes.
- Plan data collection strategies, paying careful attention to research requirements, participant privacy, timelines, and reporting needs.
- Define roles and responsibilities for all team members.
- Make a communications plan to share program information.

TOOLS, TEMPLATES, AND RESOURCES

- [Community Demographics Template](#)
- [Community IRBs and Research Review Boards](#)
- [Understanding Community-Based Processes for Research Ethics Review: A National Study](#)
- [IRB Registration with OHRP Video](#)
- [Office for Human Research Protections \(OHRP\) IRB Registration Process](#)
- [Gathering and Displaying Program Data Information Sheet](#)
- [Communications Plan Template](#)
- [How to Set Up a New Gmail Account](#)

Partnering With a Community

Understanding local dynamics can help build strong community relationships. Approach each community/community member respectfully, recognizing the research program is a guest in their space. When a program team engages thoughtfully, community members will feel valued and see how the research program's goals can benefit the community.

REAL-LIFE EXAMPLE

SYCT partnered with Pitt County, North Carolina, Hamilton County, Tennessee, and Merced County, California. Each community had distinct demographic characteristics. The programs focused on areas with low vaccination rates, high medically underserved populations, and high infection rates. By collaborating with these communities, these research programs served historically marginalized groups, addressing racial, linguistic, and socioeconomic barriers. The success of these programs was rooted in collaboration with community leaders and community members, and partnerships with organizations that had been established in previous research studies. While the research programs were designed to serve specific populations, the program teams were mindful to avoid alienating the rest of the community.

Consider the following questions when establishing a program within a community:

- How is community defined for the research program (e.g., by ZIP code, demographics)?
- Which communities have the greatest need?
- Who are the populations to be served by the research program?
- Are there limits on the geographical area or population size the research program can support?
- Are there existing relationships with potential partners?
- Do local public health entities support the research program?
- Are there connections to key community leaders?

- How can the research program gather input from community members?
- Do community organizations believe in the research program's mission?
- Are local political leaders invested in this cause?
- What networks (grassroots or health department–led) can help support the research program?
- What are the languages spoken in the community?
- Are there reliable local language resources to provide translation and interpreter services?
- What benchmarks might the research program use to measure impact?



The [Community Demographics Template](#) can help you consider, research, and describe the communities your program will serve.

Building a Team

Every public health research program will have a unique structure. This section suggests some of the key roles and responsibilities you may need for planning and running a research program. A program's structure can vary depending on its goals, size, budget, anchor partner model, or available staff.

Large, community-engaged research programs must perform certain functions. For these programs, the lead organization should have the fiscal experience to manage the project details according to the funding requirements. For national research programs running in multiple communities, there might be centralized support, with local teams handling specific tasks.

In smaller community-engaged research programs, one person might handle multiple roles. Clearly defining roles and responsibilities for all team members, including the anchor partner, is important regardless of the setup. Teams must also understand the program's timeline and follow any necessary protocols.

New programs can look across their partnerships to help fill program roles. In many cases, positions will have multiple responsibilities. A good starting point is to assess the program's needs, existing staff skills, and available human resources, and then hire for additional positions as funding is available.

REAL-LIFE EXAMPLE

In YMTT and YMCF, community organizations managed activities on the ground, while a central operations team based at an academic institution handled overall program organization. The operations team included staff responsible for both implementing and managing the program. Partner organizations supported the operations team by sharing updates on test distribution, effectiveness of communications strategies, and real-time feedback from community members. These organizations were part of broader networks, helping the program reach underserved areas. A consistent central operations team overseeing all program sites helped streamline processes and apply lessons learned from one location to the next in the nationwide rollout. This team monitored the program's timelines, activities, and budgets while handling administrative and regulatory tasks, allowing community organizations to focus on delivering the program effectively.

Example Key Roles and Responsibilities of the Program Team

- **Program Director:** oversees program direction, funding, and high-level decisions
- **Engagement Lead:** works directly with program partners
- **Operations Lead:** tracks program progress, procures needed supplies, manages budget
- **Communications Lead:** creates and implements strategic communications plan
- **Data Lead:** coordinates data collection and standards, evaluates data technology
- **Engagement Team:** orients program partners, leads outreach, collects feedback
- **Site Manager:** coordinates events and supports partners with technical assistance

Growing Partnerships

Building trust, transparency, and strong relationships with community leaders and members takes time and can be especially tough for research programs linked to government or academic institutions. Recognizing and addressing existing opinions, perceptions, and concerns builds trust and avoids potential problems. Whenever possible, lean on existing partnerships and networks. Research programs can also benefit from community engagement experts who know how to create and maintain genuine relationships with local groups.

Distrust in academia, research, and government often stems from past negative experiences with healthcare systems and ongoing discrimination of racial and ethnic minority groups. This distrust varies by race, ethnicity, and religion and can be worsened by misinformation about health topics.

Working with individuals and organizations that have earned the community's trust is essential to overcoming these barriers. A lack of established connections can limit a research program's effectiveness when new to a community. Partners act as gatekeepers to their community, providing access and insight. Local leaders familiar with the program's work can help navigate community specifics, reducing disruptions and improving the program's chances of success.

In a public health emergency, there may be no time to create authentic community engagement. Ideally, an existing community advisory board or network would help guide the program. Some communities will be better prepared than others, with networks that can quickly respond to crises. An anchor partner, or well-connected community-based organization with the proper infrastructure and established networks, can help start engagement efforts in these situations.

REAL-LIFE EXAMPLE

Community Campus Partnerships for Health (CCPH) led the community engagement efforts for the COVID test distribution research programs. As a liaison between the programs and the anchor partners, CCPH identified local partner groups and trained them on the program's goals. They managed financial responsibilities, ensuring rapid payments so partners could focus on distributing tests. CCPH also provided a community engagement expert who guided best practices, showing the program's commitment to including community perspectives. The engagement team worked closely with the anchor partners throughout the research programs, offering technical support and applying lessons learned to improve the process.

Compensation

All program partners should be fairly compensated for their time. To determine compensation, consider the number of hours worked, staff involvement level, length of participation, and local market rates. Gathering a focus group from across community partnerships can help create an engagement plan that outlines logistics, roles, and responsibilities, including compensation.

Local Health Departments

Local health departments often play a crucial role in public health research programs. When working with health departments, emphasize shared goals and how the program will benefit the community. Health departments have experience running such programs but often face resource and staff limitations. Offering compensation for their time or partnering with trusted community leaders to support community efforts can ease a health department's workload and ensure effective outreach.

Establishing Goals and Metrics

Setting clear goals and evaluation metrics can help track a research program's progress towards these goals, identify what works, and find areas for improvement. These goals and **metrics** should be developed as a team, and local voices and interests should be involved. As a group, ask, "What are the community's goals, and how do they align with this research program?" For example, how does the community hope to support children's current and future health, such as by teaching, practicing, and modeling healthy habits?

Each research program should define **metrics** (a way to evaluate progress toward goals). Some potential steps to defining and tracking metrics include:

- Building a timeline with clear deadlines to meet benchmarks or milestones to reach larger goals
- Tracking each step of the program using benchmarks. For example, did the program reach the 100 local families using 1-3 schools?
- Reviewing metrics periodically to ensure the program stays aligned with its goals and within budget. For example, when we added "Budgeting for meals" and we only planned for "Meal prep" this caused delays due to research and surveying families. Planning a post-closure project debrief to review the success of goals using metrics

Metrics generally fall into four main areas: program demographics, community engagement, operations, and communications. The table gives examples of metrics and measures for tracking progress in each area. Remember, these metrics should connect to the program's goals, created from community input.



Example Metrics

Metric	Measure
Community Engagement	
Identify anchor partner	Estimated duration
Identification of program partners by lead partner	Estimated duration
Number of program partners	Manual count
Development of budget with anchor partner	Manual count of iterations
Grassroots community connections	Type and manual count
Face-to-face meetings with program partners	Manual count
Virtual meetings with program partners	Manual count
Conversations with community members	Manual count via lead organizer
Program events planned and implemented	Manual count
Community members who participated in program	Electronica data collection tool
Thank you notes sent to program partners	Manual count
Operations	
Timelines	Types of timelines generated
Participant incentives issued	Manual count
Informed consent forms completed (English and Spanish)	Manual count
Translations into other languages	Manual count
Iterations of program partner budget and final spend	Manual count and financial records
Planning meetings held with anchor partner	Manual count
Inquiries received about program	Manual count
Results-sharing opportunities (e.g., presentations, publications)	Manual count
Communications	
Website activity	Web analytics
Social media measures	Follows, likes, clicks
Newsletter or outbound emails	Analytics and email metrics
Local media	Demographic reach
Awareness of program among community members, including populations of interest	Survey (market research)
Source of program awareness (i.e., which channel), including among populations of interest	Survey (market research)

Understanding Research Requirements

Institutional Review Boards

The operations team must gather all necessary information to meet research requirements. This often includes institutional review board (IRB) review and compliance with **Health Insurance Portability and Accountability Act (HIPAA)** regulations. IRB approval is critical to protect participants' rights and welfare.

Understanding which activities require IRB review can be complicated, so partnering with an organization familiar with the IRB process may be helpful. When in doubt, consult the IRB directly. Even research that qualifies for an exemption must go through IRB review to receive an official exemption determination. Programs affiliated with academic or research institutions often have access to an IRB, but independent IRBs are also an option.

Programs that need IRB approval should account for review timelines when planning. Determine whether participants need to provide informed consent and, if so, establish a process to collect it. If a program has a tight timeline but still needs IRB review, submit the overall program design and make amendments later to include finalized participant-facing materials.

Other approvals, such as city permits or permission to host events at certain locations, may be necessary. Some venues may require liability insurance as part of their event approval process.

Community-Based IRBs

There is growing interest in [community-based IRBs](#) or research review committees. These are created and run by an organization or community group that is outside of, or works in partnership with, a traditional research institution, such as a university.

Community-based IRBs or review committees have been created by nonprofits, tribal communities or organizations, and other community groups. They began because some researchers and community members thought this type of IRB could understand the risks, benefits, and [principles of community-engaged research](#) better than institution-based IRBs.

Those planning to create and run a community-based IRB or research review committee will need:

- Funding to support operations
- Administrative processes, including those for member **recruitment** and retention, member onboarding and training, research proposal submissions, reviews, and decisions

To be a federally recognized and compliant IRB, obtaining a Federal Wide Assurance from the Office for Human Research Protections within the US Department of Health and Human Services is required. See the [video describing the application process](#). Board membership and [operational processes](#) of the community-based IRB must meet the requirements of federal regulations known as [45 CFR 46](#).

REAL-LIFE EXAMPLE

The Rocky Mountain Tribal Leaders Council in Billings, Montana, created a community-based IRB to promote the sovereignty of Tribal Nations, build on the strengths and resiliency of Tribal populations, and protect the rights and welfare of research participants in the Billings area. [The Rocky Mountain Tribal IRB](#) works to eliminate exploitative research practices that would only benefit external groups and to protect individuals and Tribal populations involved in research. They achieve this by promoting and advancing the concerns of Tribal Nations in research projects, ensuring researchers engage ethically and collaboratively, and enabling Tribes to approve or reject research protocols and publications. These practices help the IRB maximize community benefits, ensure equity, require cultural competency, and protect cultural integrity.

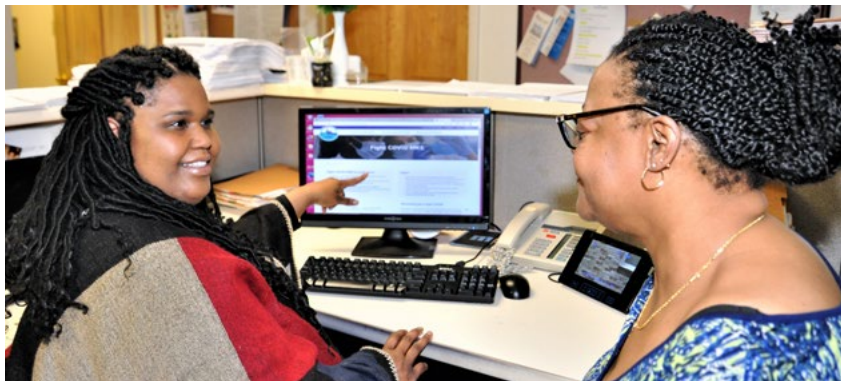
Determining Data Needs

Data can help determine if programs meet their goals, who they impacted (and how), and reveal insights into community health, behaviors and attitudes that are related to ongoing community needs. Some public health research programs rely on publicly available data for evaluation, while others collect data directly to meet their goals. Data collection methods vary and may include interviews, questionnaires, surveys, and smart devices. Each program will have unique data collection, storage, and reporting requirements.

Programs collecting participant data or health information must follow strict regulations like [HIPAA](#) and [21 CFR Part 11](#). Programs collecting **personally identifiable information** (PII) or **protected health information** (PHI) must meet security and privacy standards, with severe penalties for noncompliance. Partnering with an experienced academic or **clinical research** organization can help the program develop compliant data systems.


Data Collection and Reporting Systems

After defining data needs, evaluate data collection systems. Often data can be automatically transferred from a data collection tool to an Excel file to support data analysis and reporting. Partnering with local, academic, or clinical organizations can also help to determine the best technology solutions. Programs should ensure the technology has the right system, integration, applications, confidentiality needs, security, and data reporting capabilities to meet their goals. While every program differs, developing, pilot testing (e.g., testing out planned data collection methods on a small group of people to identify and correct errors and pitfalls), and implementing a data collection system can take time and resources. Systems may vary significantly in cost, so budget should be factored into decisions.



When planning data collection and reporting, consider the following logistics questions:

Who	What	When	How
<ul style="list-style-type: none"> Who will collect and enter data? <ul style="list-style-type: none"> For example, a program partner or clinician may interview participants and enter information on their behalf, or participants may receive a survey to complete on their own. Who will the data be shared with, and for what purpose? 	<ul style="list-style-type: none"> What data will be collected and from whom? <ul style="list-style-type: none"> Which data are necessary versus optional? Is informed consent required? Will the data collected be PII or PHI? What regulations apply? What are the privacy concerns? What is the budget and timeline for creating data collection and reporting systems? 	<ul style="list-style-type: none"> When and how often will data be collected? When will reporting systems need to be ready and when are reports required? 	<ul style="list-style-type: none"> How will the data be collected? (e.g. electronically, on paper, by phone) <ul style="list-style-type: none"> Will data collection include multiple languages? How will the program address issues with technology or connectivity? How will data be stored and for how long?



The [Gathering and Displaying Program Data Information Sheet](#) highlights two data collection tools and two platforms that can be used to display data.

Using Surveys

Surveys are a common tool for evaluating public health research programs and understanding participant demographics. When designing a survey, consider:

- Are the questions relevant to achieving the program’s goals?
- Who is answering the survey?
- Do the questions help me to measure program impact or what I hope the program will change for participants?
- Could questions be misunderstood?
- How will the collected data be used?
- Will the data help achieve the program’s goals?
- Are the “Yes”/“No” questions specific enough to avoid “maybe” responses which lead to incorrect data?

REAL-LIFE EXAMPLE

During the YMTT program, participants completed optional surveys about their demographics, health, social interactions, and behaviors affecting COVID transmission. Surveys were given regularly (e.g., baseline, week 4) or at a particular time (i.e., use of a home test). The surveys were sent via text message or email, with an option to respond by phone for those without internet access. Participants provided informed consent (or assent for minors) through the program’s app, website, or by phone. Though only a few participants responded by phone, this option ensured low-income and older community members were included.

Surveys should only ask for essential information. The data collected in surveys can inform future public health research programs by assessing whether a program's goals have been met. Many vetted survey tools are available to simplify data collection and support **program evaluation**. These include free services like Survey Monkey and Poll Everywhere, to professional services such as Qualtrics or REDCap. Partners should review what survey tools may be available within their partnership network and select the best survey tool based on factors including cost, reliability, and usability.

Creating a Communications Plan, Messages, and Materials

Creating awareness for a public health research program can encourage community participation and help meet program goals. The first step is raising awareness about the program within the populations served. Next, the **campaign** works to inspire participation.

Creating a Communications Plan

A communications plan outlines essentials such as intended audiences, goals, key messages, **communication channels**, campaign tone, and methods to measure success. Communication strategies should reflect the community's unique characteristics. Therefore, create your communications plan, similar to your other program components, together with community members. Consider these questions together with community members when developing a communications plan:

- Who is the main audience? In other words, who does the program most want to reach, and how will you reach them?
- What are the key messages?
- When, where, and how often will you communicate?
- What actions should community members take?
- How should community members feel when they think about the program?
- What defines success for the program?
- How will you help create an identity for the program through logos or branding?

REAL-LIFE EXAMPLE

The YMH COVID test distribution program created marketing campaigns to raise awareness of COVID test availability, support test distribution at community events, and encourage frequent test use. Program partners requested information on an overview of research principles and [how to create email accounts](#) to help community members without an email address who wanted to join. The program created on-demand materials to meet community needs.

While the communications plan serves as a guide, there is no “one size fits all” approach. You can add to or modify the questions of your communication plan or modify your responses/answers if you find your key messages are not understood or if you are not effectively reaching your main audience. Repeat this process until you start to see traction in your program. Local partners are invaluable, offering insights into the community’s history and present needs, preferred communications channels, and which groups are most important to reach. They also help customize the plan to address translation needs and cultural sensitivities. Understanding the languages spoken in the communities served can guide material production and minimize waste.



Use the [Communications Plan Template](#) to organize essential information for your program’s public communications.

Developing Messages and Materials

Before creating and distributing materials, it may be wise to create a brand identity for your program. This can help build recognition in the communities served. A brand might include a program name, logo, color scheme, and tone of voice.

Once a high-level plan is in place, it is time to start drafting key messages. These messages will be the foundation for all program materials, ensuring consistency across platforms, including websites, printed materials, and social media. Feedback from community members and program partners is crucial to make sure messages are accurate and relevant.

After refining the key messages, begin developing or collecting specific materials to support these messages. Examples of materials include informational brochures, frequently asked questions, websites, advertisements, or any combination of print and digital materials. Before sending out the final materials, allow program partners to review and make changes. Ensure that all materials follow health literacy guidelines and consider cultural and linguistic sensitivities.

REAL-LIFE EXAMPLE

The YES program included Spanish-speaking populations in Miami, Florida and Durham, North Carolina. The name of the program, branding, color scheme, recruitment flyers, and other study materials were co-designed with partners in Durham and Miami, and also reflected local Spanish translation to ensure they were culturally tailored to the primary population. To avoid mistranslations, each item was reviewed by a local Spanish speaker for insight and guidance on appropriate translations. This was especially relevant for the Spanish language due to the many countries and dialects. Engaging local partners allowed for tailoring and trust-building.

Selecting Communication Channels and Metrics

Selecting the right channels to promote your program will depend on budget and how your audience can best be reached. Partners can also help identify missing channels and guide the communications strategy. Some communication channels may include: .

- Local media such as radio, TV, or newspapers
- A program website to create a public space for your program's information
- Social media
- Direct mail to participants or those interested in the community
- Digital advertising such as search engines, web banners, or other online advertising
- Signage such as billboards or other paid community awareness
- Free materials that may be left in public spaces such as libraries, health clinics, or government offices

Before launching a marketing campaign, identify metrics that will measure its effectiveness. You can use Google Analytics, built-in social media analytics, or other 3rd party tools. Standard communications metrics include the number of website visitors, newsletter subscribers, social media likes or clicks, and event attendees.

Note: Similar tools were described under “**Data Visualization**”

One method to optimize materials is [A/B testing](#), where two variations are tested to see which performs better. For example, program leaders could distribute two flyer designs with the same information and track which one receives a better response. This data-driven approach helps improve campaign success by allowing program leaders to use the materials that work best.





Launching and Conducting the Research Program



Launching and Conducting the Research Program

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



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.





»»»»» Reflecting and Closing the Research Program



Reflecting and Closing the Research Program

KEY POINTS: LAUNCHING THE PROGRAM

- Thank partners for their contributions.
- Review metrics to assess the program.
- Identify successes and challenges.
- Share program outcomes widely.
- Implement a community-specific exit strategy to ensure ongoing collaboration and sustained impact.
- Help partners understand next steps.

TOOLS, TEMPLATES, AND RESOURCES

- [Program Reflection and Debrief Worksheet](#)

Thanking Partners

Partners are essential to the success of a public health research program. Recognizing their contributions shows appreciation for their efforts and builds goodwill for future work. It helps to ask partners how they would like to be thanked. Many teams have held celebration events with food to help mark the close of a research program.

Some other ideas include:

- Creating a thank you video featuring photos from local events that highlighted partners' efforts
- Inviting political leaders to celebrations to give further attention to the importance of partner contributions
- Sharing testimonials about the positive impact of the program
- Providing certificates, gifts, and stipends to recognize partners for their time and dedication
- Allowing partners to keep leftover materials and supplies
- Providing a final report or guide recognizing partner contributions to the program



Reflecting

Assessing Metrics

Once the research program is over, evaluate its success by reviewing the metrics established in the planning phase. Questions to consider include:

- Was the program accessible to community members?
- Who did the program reach?
- Did it reach the intended populations, including underserved communities and those disproportionately affected by the public health challenge?
- How did the program impact the community overall?
- What strategies were most effective in engaging the communities served?

Documenting Lessons Learned

Reflecting on the program's successes and challenges is crucial for improving future public health research programs. Budget time for evaluation and reflection between the end of one program and the start of another. With every new program, ask: How can this process be improved?

To collect lessons learned:

- Document successes and challenges throughout research program delivery
- Hold debrief sessions with partners
- Conduct post-program surveys with partners



Refer to the [Program Reflection and Debrief Worksheet](#) for capturing key insights.

REAL-LIFE EXAMPLE

The YMTT program used post-program assessments to gather program partner feedback. These evaluations helped refine operations and improve processes for future programs. This Roadmap was developed from partner feedback and was shared widely at a [summit](#) where partners discussed lessons learned, knowledge gaps, and next steps for ongoing public health collaborations.

Sharing Findings and Results

Choose effective methods to share program outcomes, such as:

- Posting on the research program's website
- Sharing results with local media
- Creating summaries of results in plain language
- Presenting at scientific conferences
- Providing results at the last research program meeting or event
- Publishing the research program's work in academic journals
- Highlighting stories of how the research program positively impacted lives

REAL-LIFE EXAMPLE

The YES study created a final summary that provided a snapshot of participation and outcomes. It includes the total number of participants, locations, demographics, and lessons learned. The study summary was posted on the program [website](#) and shared through newsletters.

Maintaining Relationships

Ending a program without follow-up can appear disrespectful and may mean passing up on future collaborations.

Develop a thoughtful exit strategy in partnership with community leaders. This plan should outline steps to maintain connections and communication with partners.

REAL-LIFE EXAMPLE

The SYCT and YMCF test distribution programs' exit strategies included:

- Encouraging organizations to collaborate on other community issues
- Sharing information about future funding opportunities
- Conducting follow-ups in the weeks and months after the program ended to monitor progress
- Scheduling annual meetings to reconnect with partners, provide updates, and assess ongoing community needs

We extend our sincere appreciation to our community partners in Merced County, CA and Pitt County, NC for their valuable insights, collaboration, and continued commitment. Their contributions were instrumental in shaping the Roadmap.

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