

# SAY YES! COVID TEST

¡DI QUE SÍ A LA  
Prueba de COVID!

PITT COUNTY, NC • HAMILTON COUNTY, TN



## Toolkit for Engaging Diverse Communities to Plan and Implement Public Health Programs

Developed by the Duke Clinical Research Institute (DCRI), University of North Carolina Center for Health Equity Research (UNC-CHER), Community-Campus Partnerships for Health (CCPH), and community partners from the Say Yes! COVID Test and You & Me COVID-Free programs.



**YOU & ME** COVID-FREE  
**TÚ Y YO** LIBRES DE COVID  
MERCED COUNTY, CA

The Say Yes! COVID Test public health initiative was a collaborative effort between the National Institutes of Health, Centers for Disease Control and Prevention, Quidel (the COVID test manufacturer), CareEvolution (a healthcare technology company), community engagement partners from RADx-UP and CCPH, and research institutions including DCRI and UNC-CHER.

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# Glossary

Term	Definition
<b>Civic organization</b>	A volunteer service group or association that operates for educational or social welfare purposes. Their goal is to improve the quality of life of others usually through the volunteer efforts of its members.
<b>Communication channel</b>	Media through which you can send a message to its intended audience, such as phone calls, text messages, emails, television, newspaper, radio, and social media.
<b>Community-based organization</b>	A public or private nonprofit organization that is representative of the community it serves. It provides services or other assistance to those within a designated or select community or segment of the community.
<b>Community engagement</b>	The process of working together with groups of people connected by a location, interest, or situation to address issues affecting the well-being of those people.
<b>Community organizing</b>	The principle of social action, bringing people together—often, but not exclusively, from the same neighborhood—to pursue a shared interest.
<b>Cross-sector activity</b>	When various organizations (i.e., public, private, nonprofit) come together to collectively focus their expertise and resources on a complex issue of importance to a community they serve.
<b>Health disparities</b>	Preventable differences in the burden of disease, injury, violence, or opportunities to achieve optimal health that are experienced by socially disadvantaged populations.
<b>Health equity</b>	Everyone having the opportunity to reach their highest level of health.
<b>HIPAA</b>	The Health Insurance Portability and Accountability Act, a federal law that protects a person's sensitive health information from being disclosed without their consent or knowledge.
<b>Marginalized</b>	People who have been kept in a powerless or unimportant position within a society or group.
<b>Measures</b>	How you will measure program performance with numbers. In other words, the unit of measurement.
<b>Metrics</b>	Items to show if a program is reaching its overall goals. In other words, they are the details on program performance.
<b>Personally identifiable information (PII)</b>	Information that permits the identity of an individual to be reasonably inferred by either direct or indirect means.
<b>Protected health information (PHI)</b>	Information about health status, provision of healthcare, or payment for healthcare that can be linked to a specific individual.
<b>Public health program (or initiative)</b>	Actions and services to protect and improve the health of people and communities. It can include strategies such as research, evaluation, policy development, community mobilization, and communication activities.

# Glossary

Term	Definition
<b>RADx-UP</b>	Rapid Acceleration of Diagnostics-Underserved Populations is a program funded by the National Institutes of Health that aims to improve access to and uptake of diagnostic COVID-19 testing in communities of underserved and vulnerable populations.
<b>Recruitment</b>	The process of finding the appropriate individual(s) to join a group, support a cause, or take part in activities.
<b>Regulated entity</b>	Any board, commission, agency, division, or other unit or subunit of state government which regulates one or more professions, occupations, industries, businesses, or other endeavors in the state.
<b>Say Yes! COVID Test (SYCT)</b>	A community-based public health program that provided free at-home COVID tests to people who are often ignored or excluded.
<b>Social capital</b>	The potential of individuals to secure benefits and invent solutions to problems through membership in social networks.
<b>You &amp; Me COVID-Free (YMCF)</b>	A community-based public health program that provided free at-home COVID tests to people who are often ignored or excluded. YMCF was based in Merced, CA.



# Introduction

**Dear Reader,**

Thank you for being someone who wants to make a difference in the lives of others. As public health and community leaders, our life's work is driven by our passion to improve people's health. But some of the biggest impacts on health do not come from work in the clinic. They come from people like you—working together to give back in communities.

Unfortunately, throughout history, discrimination and unequal access to proper care are issues that have plagued public health. However, over time, we've each witnessed how partnerships can bring positive change to diverse communities.

The COVID-19 pandemic highlighted even more that we all have a role in preserving the health of our families, friends, and neighbors.

The potential of public health work lies in the people all around us. By forging relationships, opening our ears and hearts, and taking informed action, we can move the needle toward healthier lives for all.

Our country is only as healthy as those that are in the margins. We hope you will find this toolkit helpful for creating inclusive and effective public health programs for communities.

Together, we can address health challenges one community at a time.

With gratitude,



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## Summary: About This Toolkit

This toolkit outlines the steps for public health programs that engage communities. It covers the process from start to finish. Its main goal is to share how to work well with communities. It also describes community partners' role in improving public health. We use examples from two programs that gave out COVID-19 tests.

This toolkit is for anyone who wants to work with communities for a public health program. This includes community leaders, researchers, project leaders, and communicators.





## Using This Toolkit

### When to Use This Toolkit

This is a guide for building community partnerships to carry out public health programs. Partnering with community members is vital to addressing local health issues. Community members know their community best. They will know what is important to their friends and neighbors, and how to get things done in their area.

We focus on tips for working with people that have been not been included enough in public health efforts to date. These may include racial and ethnic minorities, people with lower incomes, and non-English speakers. Such groups have a long history of being ignored and mistreated. So, we need to be aware of racial, political, cultural, and religious factors when doing public health work.

This toolkit highlights the key role of community partners during a health crisis. The best practices we share come from our work giving out more than 2 million at-home COVID-19 tests in three U.S. counties. We share lessons learned from community leaders, science leaders, project leaders, and communicators.

We suggest using this toolkit as early as you can when planning a public health program. Community partnerships offer the best chance for a project to be meaningful, successful, and fair. But, if your program has already started, we also share tips that can help at any stage. We expect that many users of this toolkit will already have gotten funding to support their program so we do not cover that step.

## Who Should Use This Toolkit

We hope this toolkit will be useful for many types of groups. There is no standard structure for a public health program involving community partners. A program may come from any of the groups below, or other groups. We aim to provide helpful information for all of them.

- **Local health organizations**
  - Public health departments
  - Community hospitals and clinics
  - Federally Qualified Health Centers
- **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
- **Academic and research organizations**
  - K-12 schools, colleges, and universities
  - Academic research organizations

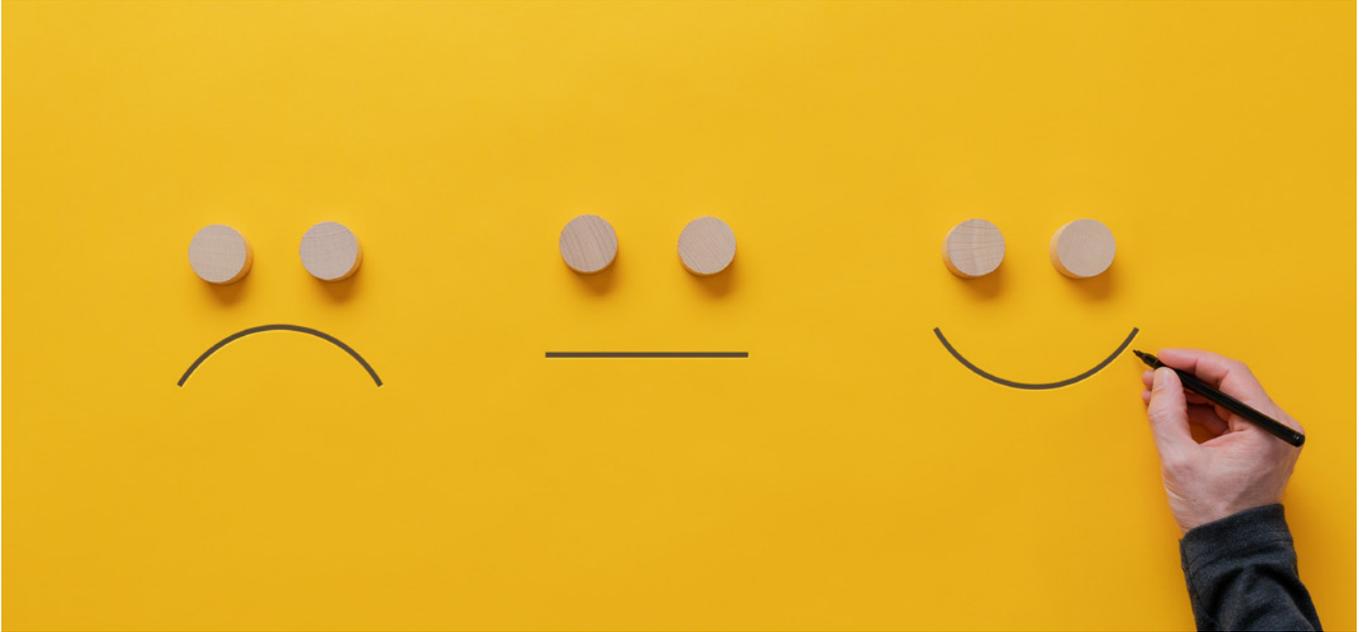




## How to Use This Toolkit

We organized this toolkit into the steps needed to plan, start, and complete a public health program that engages community partners. It can serve as a how-to guide from start to finish. If you are just getting started with planning your program, you will learn the most from reading the steps in order. But, because every reader and program is different, not everything may be relevant. You can also use the table of contents to skip to steps of most interest to you. Broadly, this toolkit covers the following topics:

- **Community engagement**
- **Public health program design and planning**
- **Communications and marketing**
- **Operations and logistics**
- **Data collection and reporting**



## We Want to Hear From You

We want to keep improving this toolkit so it can be even more helpful. We welcome your thoughts on how to make it better.

Fill out this quick form to let us know...

- How did you use the toolkit?
- In what ways did the toolkit help you?
- Was anything missing?
- Can you share some examples from your program?

[GO TO ONLINE SURVEY](#)



## Learning From Examples

This toolkit contains tips and templates from our work on two public health programs in 2021: Say Yes! COVID Test (SYCT) and You & Me COVID-Free (YMCF). These were community-based programs seeking to slow the spread of COVID-19. We gave out more than 2 million free at-home tests. Our focus was on trying to include and help people that often get ignored or excluded. These groups have higher rates of COVID 19 infection and deaths.

On top of improving health in these communities, we also wanted to come up with good approaches for future public health programs to engage community partners. The methods we used in SYCT and YMCF helped us reach the people who could benefit most. In this toolkit, we share examples from our testing programs to support our tips and show how to apply them. We hope our work on SYCT and YMCF will help others better respond to future public health needs.

As community members get more involved, communication, trust, and impact increase.

# Reviewing Community Engagement Basics

**THIS SECTION WILL COVER:**

What community engagement is and why it matters so much for public health programs

Before we dive into planning your program, let's review the main ideas of community engagement.

## **What is a community?**

A community is a group of people with a shared identity, purpose, or interests. People in a community could be connected by where they live, where they work, what they believe, who they love, or their shared experience. A community could also be people at higher risk for a disease. A community can bring people together to fight illness or improve health.

## **What is community engagement?**

Community engagement is working together with groups of people to improve their well-being. It is a way to help people make change in their community. Community engagement involves sharing knowledge, planning, and making decisions together to support programs that help the community.

## **What are the forms of community engagement?**

Community engagement can take many forms. Examples include planting a shared garden or holding a food drive. It can also include building long-term relationships and working on public health programs. You can think of engagement as a spectrum from outreach to shared leadership. As community members get more involved, communication, trust, and impact increase.

## **Why does community engagement matter?**

Communities with more engagement in local issues (including health) are better able to band together and tackle problems. Engagement can also help promote health equity. It gives the voices of disadvantaged or marginalized people a chance to be heard. Without their input, public health programs are much less likely to improve healthcare for them. So, community engagement can help to reduce health disparities.

# Benefits of community engagement



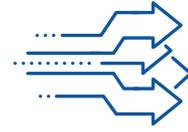
## 1 Setting the agenda

Engaging a broad group of community members can assure that **different voices and interests inform the program's goals**. Early community buy-in leads to program success.



## 2 Designing the program

Community members are the experts on their needs. They also **know what will or won't work in their communities**. They can advise on how to improve the program.



## 3 Getting ready for change

Community engagement can help turn a program into **lasting change for the community**. It can help build the tools, knowledge, and network to sustain what works. It can also influence guidelines and policies.



## 4 Informing ethics

Community members can help ensure a program is **mindful of people's culture and language**. They can also give input to make sure the program's design and methods are ethical.



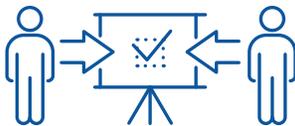
## 5 Enhancing social capital

**Building trust and respect among program partners** will support long-term commitment. Strong networks can help enhance and sustain public involvement in these programs.



## 6 Partnering with academic groups

Engaging academic partners can add to the efforts of community members by providing **scientific expertise and more resources**.



## 7 Learning from program partners

When community members inform a program's design and methods, the program will address community needs. Tailoring a program for a community can lead to **smoother rollout, greater uptake, and longer lasting effects**.



## 8 Broadening community partnerships

Engaging diverse groups can **build on existing networks and strengthen trust**. Partners could include churches, local nonprofits, and health organizations.



## 9 Reaching the right people

Community engagement can **get people involved in public health**. A community-engaged program can improve health equity and well-being in communities.

## Best Practices for Community Engagement

Covering all the principles and methods of community engagement is beyond the scope of this toolkit. But, there many resources on this topic. We link to some of them at the end of this section. We will point out tips for meaningful engagement throughout this toolkit as they relate to the steps of your program.

### KEY POINTS

1. Different types of connections—not just a shared location—can define a community
2. There are many benefits of engaging communities in public health programs
3. More community involvement leads to greater program impact

### RESOURCES

#### [Principles of Community Engagement](#)

A guide created by the U.S. Department of Health and Human Services (2011)

#### [Exploring Impact: Public Involvement in NHS, Public Health and Social Care Research](#)

Findings on the impact of community engagement (2009)

#### [Creating the Healthiest Nation: Advancing Health Equity](#)

A fact sheet from the American Public Health Association

#### [What are Important Ways of Sharing Power in Health Research Priority Setting?](#)

A journal article with perspectives from people with lived experience and members of the public (2021)



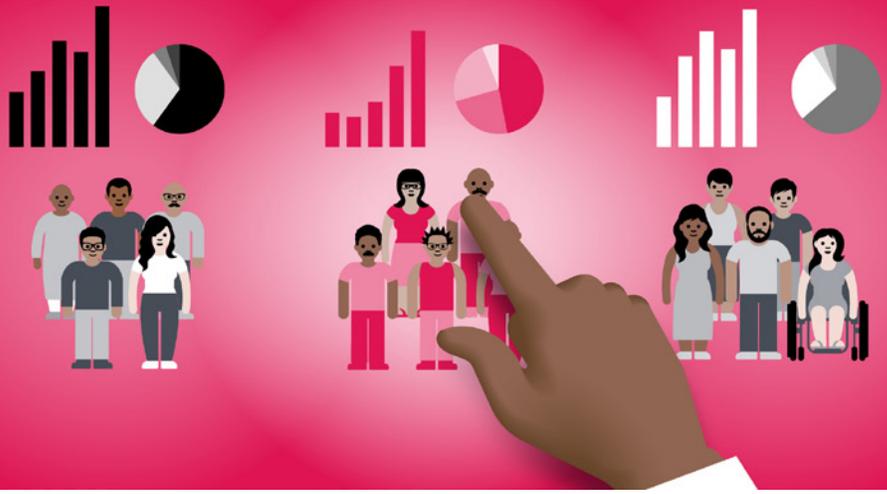
# Planning

## PLANNING

# Choosing a Community

### THIS SECTION WILL COVER:

What to look for when deciding to partner with a community



A thoughtful community selection process can help your program achieve its goals.

Consider the following questions:

- How do you define community for your program? For example, by ZIP code, shared identity, common beliefs, etc.?
- How can you find communities with the greatest need?
- What are the most important groups of people to reach with your program?
- Does your program need to be in a specific geographic area? Is there a number of people needed to make the program work?
- Does anyone on your team already have relationships with potential community partners?
- Does the local public health department support your program?
- Do you have connections with community leaders?
- What opportunities are there to ask for input from community members?
- Do you have buy-in from community leaders?
- Do you need support from local government?
- Are there existing networks (grassroots or health department-led) that you can connect with?

The answers to these questions are very important as you look for the best community for your program. You will also need a strong lead community partner. We will describe how to identify a lead community partner in the next section.

What opportunities are there to ask for input from community members?



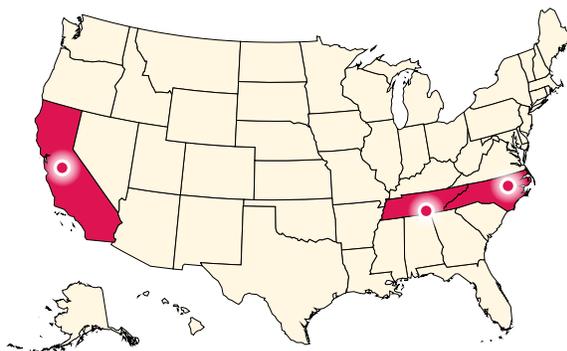
Merced County, CA



Hamilton County, TN



Pitt County, NC



**CASE EXAMPLE**

For our COVID test programs, we chose three communities. The table shows a summary of what we looked at during the selection process. Based on our program's goals, we chose areas with low COVID-19 vaccination rates and high rates of COVID-19 spread.

We also looked for diverse communities with many people from racial and ethnic minorities, and many people with lower incomes. We needed access to local wastewater testing data so we could measure the effects of our program. We also looked for areas where we already had connections with community leaders and groups.

## Community Characteristics Evaluated During Selection Process

	Pitt County, NC	Hamilton County, TN	Merced County, CA
<b>Community description</b>	Rural areas with small urban center (Greenville)	Urban (Chattanooga) with some rural areas	Agricultural with small urban center (Merced)
<b>Population</b>	180,742	367,804	277,680
<b>Average age of residents</b>	32.5 years	39.6 years	31.7 years
<b>Median annual household income</b>	\$47,437	\$57,502	\$61,167
<b>Poverty rate</b>	22.9%	12.8%	21.1%
<b>Race/Ethnicity</b>	White: 57.2% Black or African American: <b>34.7%</b> American Indian or Alaska Native: <b>0.3%</b> Asian: <b>1.7%</b> Native Hawaiian or Other Pacific Islander: <b>0.1%</b> Two or More Races: <b>2.6%</b> Hispanic or Latino: <b>6.3%</b> White, Not Hispanic or Latino: <b>54.4%</b>	White: <b>75.3%</b> Black or African American: <b>19.1%</b> American Indian or Alaska Native: <b>0.2%</b> Asian: <b>2.1%</b> Native Hawaiian or Other Pacific Islander: <b>0%</b> Two or More Races: <b>2.1%</b> Hispanic or Latino: <b>5.6%</b> White, Not Hispanic or Latino: <b>71.1%</b>	White: <b>82.2%</b> Black or African American: <b>3.9%</b> American Indian or Alaska Native: <b>2.5%</b> Asian: <b>7.8%</b> Native Hawaiian or Other Pacific Islander: <b>0.4%</b> Two or More Races: <b>3.2%</b> Hispanic or Latino: <b>61.0%</b> White, Not Hispanic or Latino: <b>26.5%</b>
<b>Vaccination rates</b>	41%	44%	49%

Source: U.S. Census Data and CDC Vaccination Data

### KEY POINTS

1. Not every community is right for every program
2. Think about what community qualities will best align with your program goals
3. Existing community connections can help make your program a success

### TOOLS AND TEMPLATES

GO TO:

**COMMUNITY EVALUATION TEMPLATE**

## PLANNING

# Finding Key Partners

### THIS SECTION WILL COVER:

Two key kinds of partners:  
lead community partner and  
academic or public health  
partner

Tips on how to find a good  
partner of each type



A successful public health program includes partners with a variety of knowledge and skills. Depending on your organization's type, it may be a good idea to bring in other groups. Partners can provide different services or connections to strengthen your program. If you are with an academic or public health organization, gaining a lead community partner will be very important. If you are with a community organization, an academic or public health partner could help your program.

## Finding a Lead Community Partner

The lead community partner is central to community-engaged public health programs. They will manage program activities in the community, including recruiting more partners as needed.

### There are three models for lead community partners:



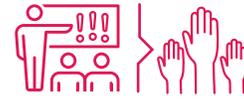
#### Crisis management model

Lead community partner is a regulated entity with fulltime paid staff who manage or resolve a major crisis or community issue. Examples include a health department or a military unit.



#### Grassroots model

Lead community partner is a community-based leadership organization that uses a team-based approach to carry out programs in the community. Its team of partners will include faith-based, nonprofit, and civic organizations with paid or unpaid staff.



#### Hybrid model

Lead community partner has the capacity to deliver a large part of the program via its own organization. It will also recruit other community partners from its network who will contribute to the effort.

A single public health program may use different models across the communities it is serving. This was the case for our COVID test programs.

The best lead community partners have the following qualities:

- A reputation as leaders in their community
- Known within their communities as the go-to person or organization
- A track record of bringing about positive change within their community
- The capacity, knowledge, and connections to address a major community challenge or crisis
- Partnerships and networks with other community organizations, such as food distribution programs, local government agencies, small businesses, large employers, school districts, and more

As you reach out to potential lead community partners, it is helpful to share both information about your program and its goals and a description of the role of a lead community partner. A stepwise approach to introduce your program to candidate groups might include sending a one-page program brief via email and then reviewing a program overview slide deck via videoconference. Informal one-on-one phone conversations are also helpful to establish rapport during the initial outreach phase.

A “job description” (or scope of work) for your program’s lead community partner can help communicate clear requirements and expectations. We suggest including the following information:

- Program timeline or anticipated time commitment, including deadlines that cannot be changed
- Geographic area to be covered
- Required protocols for the managing local program operations
- Resources including a budget to support their role and other partner organizations
- Quotas to meet, such as number of people or households reached, events held, etc.
- Details for assessing capacity and capabilities of additional partners
- Space requirements for operations and/or storage needs
- Staff training or qualification requirements
- Expectations for documentation and reporting



While it may be helpful to have a framework of critical program elements established before engaging potential lead community partners, not all plans need to be set in stone. In fact, these organizations can provide valuable input on how best to organize a successful public health program in their community. They will know about language and cultural considerations, and have relationships with key leaders in the community. Refining a program to meet the unique aspects of each community is essential. In other words, no two communities are the same.

Ideal lead community partners will have experience organizing cross-sector activities, such as public health, disaster preparedness, or civic engagement initiatives. It is important to fully understand the capacity of an organization to manage and execute work in a way that will allow you to meet your program's intended outcomes. Partnering with community organizations throughout the entire process, starting with the planning stage, will allow you to receive important feedback at each phase of the project. Establishing a clear process for communication at the outset will help support a lasting collaboration.

We will describe more tips for engaging community partners throughout this toolkit.

**Refining a program to meet the unique aspects of each community is essential.**

**CASE EXAMPLE**

**United Way of Merced County was the lead community partner for YMCF. This highly regarded organization had provided leadership for many community-wide projects, ranging from food distribution to job training, weatherization, rapid COVID testing, tax preparation, and more. They had a strong reputation in the community along with the resources and staff to support the program.**



**Their experience coupled with expertise in the management of large-scale projects proved invaluable in tailoring the project to meet the needs of the community. They were also able to respond quickly to issues that came up during the program, such as weather, local events, or shifts in needs and demands.**



## Finding an Academic or Public Health Partner

Community partners can benefit from working with academic or public health groups. These groups have experience getting funding, doing research, and running complex programs. They also understand laws and regulations that apply. They have staff who specialize in project management, data/technology, and communications.

To gain an academic or public health partner, you will first need to find a person to contact. You could start by looking up groups in your area and the units within them that relate to your program. Think about the people you want to reach (children, people with disabilities, etc.) and the kind of program you are creating to help find the best match. For instance, a vaccine program might fit best with a university’s School of Medicine, while a project on air filtration could fit better with its School of Engineering.

Some communities have city or county advisory boards that can create connections among different groups. These may be a helpful resource.

While academic partners can strengthen a public health program, they may have their own rules and steps to follow. Examples include review and approval processes, legal or contracting steps, and publications policies. Be aware of how these could affect your program and timeline.

### KEY POINTS

1. Key partners can add great value to your program
2. There are 3 models for lead community partners—the right one will vary by community
3. Know what you need from your key partners and use clear, open communication from the start

### TOOLS AND TEMPLATES

**GO TO:**

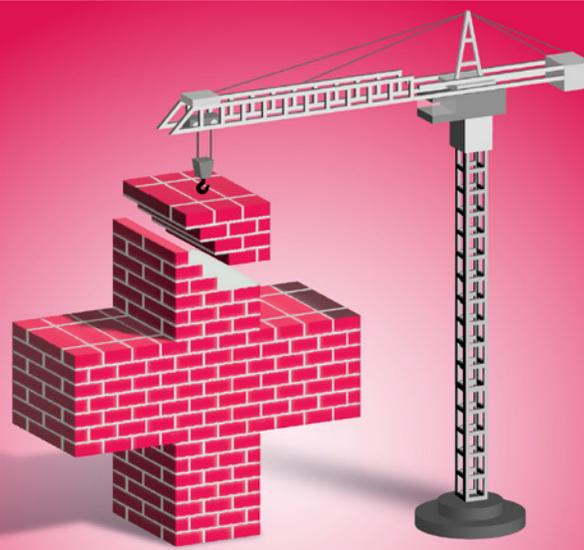
**LEAD COMMUNITY PARTNER DESCRIPTION**

## PLANNING

# Building Your Team

### THIS SECTION WILL COVER:

Important team members roles from program planning through completion



Each public health program may have a different setup, but there are common functions needed across all of them. The table in this section shows an example of a program team with each person's role described. You will create a team to best support your program. What this looks like will vary based on each program's needs, size, budget, lead community partner model (described in the previous section), available staff, and other factors.

Your program team may end up looking very different from our example, but it should still cover the same key areas. For smaller or grassroots groups, one person will often fill more than one role. Programs taking place in many communities (like SYCT and YMCF) might have central support plus roles at the local level. No matter how your program is set up, it is essential to define the roles of all team members clearly. Teams also need to understand the program timeline and processes.

A strong and ethical program will include diverse team members. Having community partners in leadership roles can help ensure their voices have a major part in shaping the program. This way, they are not just on the team, but also involved in decision-making. Shared leadership is one way of power sharing to try to account for differences in power and privilege.

**A strong and ethical program will include diverse team members.**

### CASE EXAMPLE

**In SYCT and YMCF, community partners managed program work at the local level. A central team at the academic partner managed the overall program. This included its timeline and budget. By taking care of the administrative tasks centrally, community partners could focus on program delivery.**

**Local partners gave frequent updates and feedback to the central team. A large public health program may start up in several places at the same time, or one after the other. In our case, having the same central team for all communities had several benefits. We were able to apply lessons from one community to the next and become more efficient over time.**

## Key Team Member Roles

Role	What they do	Skills or experience needed
<b>LEADERSHIP TEAM (LED BY PROGRAM DIRECTOR)</b>		
<b>Program director</b>	<ul style="list-style-type: none"> <li>• Comes up with program concept</li> <li>• Gets funding</li> <li>• Builds leadership team</li> <li>• Provides overall guidance</li> <li>• Makes high-level decisions</li> </ul>	Medical, scientific, or public health qualification or experience
<b>Engagement lead</b>	<ul style="list-style-type: none"> <li>• Selects lead community partner</li> <li>• Gives input on fair work for community partners</li> <li>• Sets how much to pay community partners</li> <li>• Meets often with community partners, engagement team, and communications team</li> </ul>	Community engagement and public health background or experience
<b>Operations lead</b>	<ul style="list-style-type: none"> <li>• Tracks overall program progress vs goals</li> <li>• Monitors risks to program success and brings these to program director when needed</li> <li>• Gets program supplies and develops a plan to give them out to community partners</li> <li>• Makes a list of program metrics to collect</li> <li>• Creates and manages overall program budget</li> </ul>	Project or program management experience
<b>Communications lead</b>	<ul style="list-style-type: none"> <li>• Creates overall communications plan for the program (with input from other leaders and partners)</li> <li>• Advises on program branding and messaging</li> <li>• Builds communications team (including contractors as needed)</li> <li>• Manages creation of all marketing materials</li> <li>• Adjusts communication plan as needed</li> </ul>	Health communications background or experience
<b>Data lead</b>	<ul style="list-style-type: none"> <li>• Maps program's data flow</li> <li>• Reviews technology options to meet program's data collection, storage, and reporting needs</li> <li>• Advises on data standards, processes, and regulations that must be followed</li> <li>• Manages all data technology work</li> </ul>	Technical project management, clinical data management experience
<b>ENGAGEMENT TEAM (LED BY ENGAGEMENT LEAD)</b>		
<b>Engagement support staff</b>	<ul style="list-style-type: none"> <li>• Holds an orientation for community partners</li> <li>• Leads outreach and holds discussions with potential community partners</li> <li>• Gives support and technical help to community partners</li> <li>• Gathers input from community partners</li> <li>• Serves as liaison between leadership, operations, and logistics teams</li> </ul>	Experience in community organizing, civic engagement, and public campaigns

## Key Team Member Roles

Role	What they do	Skills or experience needed
<b>OPERATIONS AND LOGISTICS TEAM (LED BY OPERATIONS LEAD)</b>		
<b>Lead organizer</b>	<ul style="list-style-type: none"> <li>Leads orientation sessions for community partners</li> <li>Manages overall plan for program in the community</li> <li>Supervises team members and community partners (as appropriate)</li> <li>Communicates with community partners and other partners often</li> <li>Holds meetings with team members and community partners</li> <li>Manages the budget</li> </ul>	Experience in community organizing, trusted in the community
<b>Site manager</b>	<ul style="list-style-type: none"> <li>Coordinates program events</li> <li>Supports other partners with technical help</li> </ul>	Experience organizing large community events
<b>Logistics lead</b>	<ul style="list-style-type: none"> <li>Manages the receipt, storage, and transport of program supplies</li> <li>Makes sure the correct number of items gets to the correct places</li> </ul>	Logistics experience
<b>Operations support staff</b>	<ul style="list-style-type: none"> <li>Creates and maintains a contact list of all community partners and other partners</li> <li>Documents discussions, decisions, and lessons learned</li> <li>Records program processes</li> <li>Gets program materials translated as needed</li> <li>Sets up payment method for people in program if needed</li> <li>Creates consent forms and completes regulatory steps if needed</li> </ul>	Project/program management experience
<b>COMMUNICATIONS TEAM (LED BY COMMUNICATIONS LEAD)</b>		
<b>Communications support staff</b>	<ul style="list-style-type: none"> <li>Creates marketing materials</li> <li>Handles local media outreach to publicize the program and its events</li> <li>Uses social media and other ways to spread awareness of the program and its events</li> <li>Takes photos and videos of program events</li> <li>Reviews and reports on communications metrics</li> <li>Works with community partners in support of program communications</li> </ul>	Communications background or experience

## Key Team Member Roles

Role	What they do	Skills or experience needed
<b>DATA AND REPORTING TEAM (LED BY DATA LEAD)</b>		
<b>Clinical data specialists</b>	<ul style="list-style-type: none"> <li>• Outlines data collection needs and details</li> <li>• Programs data collection system</li> <li>• Ensures program data meets quality standards</li> </ul>	Skilled in database design, technical design, and requirements analysis
<b>Informatics specialist</b>	<ul style="list-style-type: none"> <li>• Maps data collection needs to industry standards</li> <li>• Ensures data collection tools match program goals</li> </ul>	Health science background, skilled in statistics and informatics

**KEY POINTS**

1. Team structures will vary based on the program but usually include leadership, engagement, operations, communications, and data roles
2. Include diverse members including people from the community



## PLANNING

# Developing Partnerships

### THIS SECTION WILL COVER:

How to partner with people and groups in the community

Paying partners fairly



Before launch, a program needs to build trust, show transparency, and create working relationships with community leaders and members. These relationships take a long time to build, and can be more challenging for programs with government or academic groups involved. It is important to recognize the thoughts and concerns that community partners have about both of these groups. Building on existing partnerships and networks is helpful when possible. Public health programs can also benefit from experts in community engagement with the ability to develop and sustain authentic community partnerships.

The COVID-19 pandemic increased the mistrust that many communities already had for government. This mistrust stems from experiences with healthcare systems and ongoing discrimination affecting racial and ethnic minority groups. Level of mistrust can vary based upon race, ethnicity, and religious beliefs. Mistrust can extend to misinformation about health topics, creating challenges for public health programs.

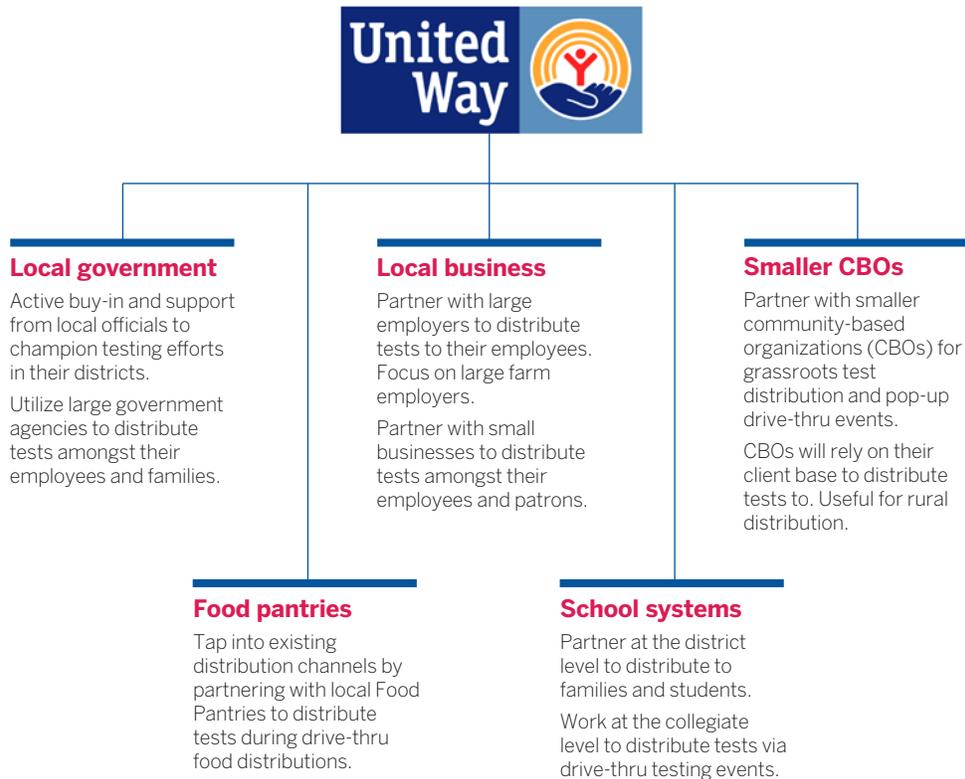
Partnering with people and groups who are already trusted is essential. When a program comes from outside the community, it will have limited connections. Community partners are gatekeepers to their community. Local leaders who understand your program can offer guidance on how to work with their community. They can advise on ways to lessen disruptions and increase your program's chance of success.

All groups of people in the community who may be affected by the program should have a chance to have their voices heard. Not only is it the right thing to do, but diverse viewpoints can improve the quality and impact of your program.

**Building on existing partnerships and networks is helpful when possible.**

In the case of a new public health crisis, there may not be time to create an authentic community engagement process from scratch. Ideally, there would be a community advisory board or similar group already set up to inform the program from the start. Some communities have networks that are prepared to act quickly should a disaster or crisis occur. If not, a well-connected community organization with systems and resources already in place would be an ideal lead community partner. They would have skilled staff to lead a public health program and networks they could pull together rapidly.

**Example Community Partner Network**



**Local Health Departments**

Community-engaged public health programs often involve local health departments. When engaging local health departments, focus on the shared impact that you want to achieve in the community. Local health departments have experience carrying out such programs, but they have limited resources. In times of public health crisis, they may already be stretched thin with other work. Paying for the time of their staff who serve a role on the program is one option. You can also engage trusted community leaders to partner with them. The partner could support community outreach, reducing the effort needed from health department staff.

## Compensation

Community partners should be paid fairly for their work. Knowing how much to pay them can be a challenge. We suggest looking at the number of hours involved, number (and effort) of staff, length of time, and local rates. An academic or research partner, or a community engagement consultant, may be able to help with this process. Also, consider having a focus group of community partners to create a buy-in plan. This plan would clearly outline logistics, roles, and responsibilities for partners.

### CASE EXAMPLE

Community-Campus Partnerships for Health (CCPH) led community engagement for YMCF and SYCT. They were a liaison between the project sponsor (a government group), the academic partner, and the lead community partner. CCPH helped identify the lead community partners and other local partners. They held trainings and handled the payment process. This allowed partners to focus on program work in the community.



**Community-Campus Partnerships for Health**  
Promoting Health Equity and Social Justice

A CCPH leader sat on the program’s leadership team to ensure that we followed best practices for community collaboration. They also brought knowledge from working with communities that are often marginalized. The CCPH engagement team worked closely with the lead community partners. They provided technical support and applied lessons learned to improve the process of engagement.

### KEY POINTS

1. Involve diverse partners from the community
2. Working with trusted partners who have existing connections can be very helpful

### RESOURCES

**[Beyond Incentives for Involvement to Compensation for Consultants](#)**

A journal article on compensating community experts (2013)

**[Community Voice and Power Sharing Guidebook](#)**

A guide from the Urban Institute (2021)

# Creating Program Goals and Metrics

**THIS SECTION WILL COVER:**

Why it is important to set up program goals and metrics early

The difference between goals, metrics, and measures

Examples of how these can show program success and what needs to improve

Agreeing on program goals and how to measure success can help ensure everyone is working toward the same purpose. This step will also help your team know if the program is reaching its goals and where it needs to improve. Community partners have a key role in forming the program goals and metrics. A good place to start is asking, “What are the community’s goals and how can the program help?”

By working with community partners to create the program goals and metrics, these will align with the ideals and values of the community. Make sure partners are not just present, but also heard. Ask yourself, “Do community partners have an equal chance to share their ideas during this process?”

**Each program should identify:**



## Goals

Clear statements of what impact you would like the program to have. They provide the big picture. It is critical to create goals with community input.



## Metrics

Details on program performance to show if a program is reaching its overall goals.

**Metrics can help with:**

- Tracking each stage of a program
- Ensuring that the program is making progress on its goals
- Seeing if the program’s work is on time
- Giving feedback to the program team so they can make changes if needed

**Metrics for public health programs often fall into three types:**

- Community engagement
- Operations
- Communications



## Measures

How you will measure program performance with numbers. In other words, the unit of measurement.

## Example Metrics and Measures

Metric	Measure
<b>COMMUNITY ENGAGEMENT METRICS</b>	
Number of community partners	Count
Grassroots community connections (school systems, food banks, etc.)	Type and count
Meetings with community partners	Count
Lead community partner conversations with community members	Count via lead organizer
Program events planned and held	Count
Community members who took part in the program	Count via electronic survey
Thank you notes sent to community partners	Count
Feedback from community partners and community members	Count
Post-project collaborations	Count
<b>OPERATIONS METRICS</b>	
Timelines	Types of timelines generated
Participant payments issued	Count
Informed consent forms completed	Count
Versions of community partner budget and final spend	Count and financial records
Planning meetings held with lead community partner	Count
Results-sharing opportunities (presentations, publications, etc.)	Count
<b>COMMUNICATIONS METRICS</b>	
Website traffic and where it came from	Google Analytics
Digital channel performance (Facebook, Instagram, Google Search, etc.)	Conversion and engagement rates
Other channel performance (billboards, radio, etc.)	Impression/cost per impression
Media coverage (television, newspaper, etc.)	Count
Awareness of program among community members, including groups of interest	Survey
How community members learned about the program	Survey

### KEY POINTS

1. Goals co-created with the community should guide your program
2. Choose metrics and measures that can show if the program is on track with its goals

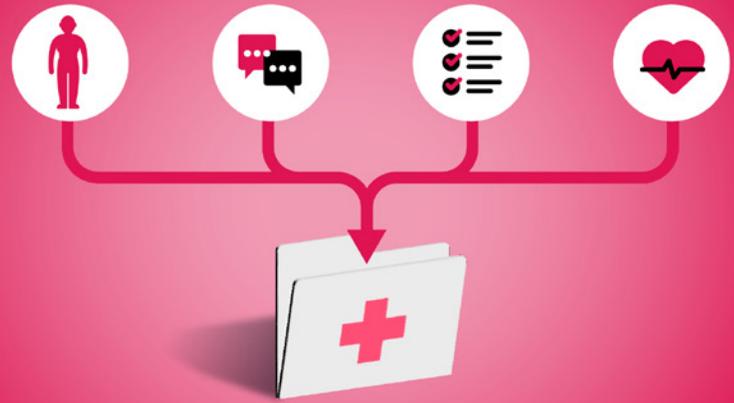
## PLANNING

# Assessing Data Needs and Systems

### THIS SECTION WILL COVER:

What to think about when planning to collect data for your program

Examples of how to assess systems for collecting, storing, and reporting data



## Assessing Data Needs

Some public health programs will only use publicly available data. Other programs may collect their own data to get information. For example, data can show if a program is working well, and if there are changes in the behaviors, attitudes, and health of a community. You could collect data many ways, such as:

- Interviews
- Surveys
- “Smart” devices like fitness trackers

Each project will have different needs for data capture, storage, and reporting.

There are laws in place to protect people when others are collecting data from them—including for public health programs. Both the act of collecting data and the technology used to collect and store data are tightly regulated. Rules include those set out in HIPAA (the Health Insurance Portability and Accountability Act) and the US Code of Federal Regulations (or CFR).

Programs collecting certain types of data, including data that could identify a person or health-related data, must meet specific sets of security and privacy standards according to federal and state regulations. Not following these rules can result in large fines or even jail time.

If you will be collecting data as part of your program, we suggest partnering with an academic or clinical research group who will know how to comply with these regulations.



### TERMS

#### Personally identifiable information (PII)

Information that permits the identity of an individual to be reasonably inferred by either direct or indirect means.

#### Protected health information (PHI)

Information about health status, provision of healthcare, or payment for healthcare that can be linked to a specific individual.

As you figure out what data you would like to collect and report for your program, consider the following questions:

### WHAT

1. What questions would you like to answer with the data?
2. What sort of data do you want to collect, and from whom?
  - Which data are absolutely needed?
  - Which are desired but optional (to reduce participant burden)?
  - Are there questions that you should not ask of the community, due to privacy or misuse concerns, or general distrust of data collection?
  - Do you need to capture informed consent?
  - Will you collect PII or PHI?
  - Will you collect data in more than one language?
3. What regulations apply?
4. What are the privacy concerns?
5. What is the budget and timeline for setting up the data collection and reporting systems?

### HOW

1. How will you collect the data—electronically (website, mobile app, etc.), on paper, or over the phone?
2. How will you handle potential technology or connectivity limitations? For example, collecting data on smartphones in areas with poor cell coverage.
3. How will data be stored, and for how long?
4. How will you send out data and reports?

### WHO

1. Who will be collecting and entering data (clinicians, volunteers, self-report, etc.)? Will data collectors need training?
2. With whom do you need to share the data?
3. Whom are the data reports for, and what is the purpose of the reports?

### WHEN

1. When and how often will you collect data?
2. When do data collection and reporting systems need to be available?
3. When or how often are data reports needed?
4. When and how often will data updates happen?



## Using Surveys

Surveys are often used to see if a public health program has met its goals and gather information about people in it. Survey results can also inform future public health programs. To be valid and useful, surveys must be designed with care. There are many surveys that have gone through a process to make sure they work well. Using a good survey that already exists can make collecting data and sharing results much simpler. This way, results are also easy to compare to other work, both past and future.

Some surveys require a license for use. Most research and academic groups have access to these.

**To be valid and useful, surveys must be designed with care.**

### CASE EXAMPLE

We asked people to complete surveys about their age, race, ethnicity, health, and behaviors that could affect their risk of COVID. We wanted to know if our program could help slow the spread of COVID in a community. We used text messages and email to remind people to take the surveys. People could fill out the surveys online or by calling a toll-free phone number.

Though only a small number of people called, having this option was very important to the program's community partners. It meant that people without internet access and older people could still take part.

When informed consent was needed, people could also complete it online or by phone. We asked people a few basic details before they agreed to a longer survey.



## Setting Up Data Collection and Reporting Systems

Once you figure out what data you want to collect, you can start to look at what systems best suit your needs. If your team is not skilled in setting up data collection systems for health programs, then you can seek local partners to fill this role. Working with experts in this area will be better for your program’s budget and timeline. You could also partner with an academic or research group for help with selecting the best technology for your program. They will look at things such as system setup, how a system can work with other tools, and how it can report data. Keep in mind that while every program is different, developing, testing, and setting up a data collection system can be a very long and costly process. The costs of systems varies based on the needs of the project. The costs and timeline should be factored into the project plan.

### CASE EXAMPLE

For YMCF and SYCT, a team of data experts, programmers, statisticians, and quality assurance staff led the process for choosing a data system. We needed an easy-to-use system that let people self-report on their mobile device or another way (website, phone).

To help see how data would be collected, transported, stored, and reported, the team made both broad and detailed data flow diagrams. Early diagrams can be as simple as using a whiteboard to map out the flow of data. Detailed diagrams will get into technical aspects such as file transfer steps and security standards.

For YMCF, we chose a group of data systems that could work together to best fit the program’s needs. For SYCT, we used one custom system.

## Data Collection Systems Used for SYCT and YMCF

	SYCT	YMCF
<b>Electronic data capture tool</b>	MyDataHelps by CareEvolution	<b>Primary:</b> REDCap <b>Secondary:</b> Qualtrics, Google Analytics
<b>Core features</b>	<ul style="list-style-type: none"> <li>• App for iOS and Android</li> <li>• Supported instructions to guide user through COVID test steps</li> <li>• Self-completed surveys</li> <li>• Auto-reminders</li> <li>• Back-end management portal for research team</li> </ul>	<p><b>REDCap</b></p> <ul style="list-style-type: none"> <li>• Simple to create surveys</li> <li>• Self-completed surveys</li> <li>• Simple reports</li> <li>• Back-end management portal for research team</li> <li>• Web-based (no need to install an app)</li> </ul> <p><b>Qualtrics</b></p> <ul style="list-style-type: none"> <li>• No-login COVID-19 test kit tracking</li> </ul> <p><b>Google Analytics</b></p> <ul style="list-style-type: none"> <li>• Website usage data</li> </ul>
<b>Data collected</b>	Details of people who took part (age, race, etc.), informed consent, demographics, COVID-19 test results, self-reported surveys	<p><b>REDCap:</b> Details of people who took part (age, race, etc.), informed consent, COVID-19 test results, self-reported surveys</p> <p><b>Qualtrics:</b> Number of test kits given out, ZIP codes</p> <p><b>Google Analytics:</b> Website visits, button clicks, etc.</p>
<b>Data integration</b>	Data fed to DCRI systems for custom reports and analysis	Data from all systems joined for a single report view
<b>Key reports</b>	Details on who completed the surveys, list of mailing addresses (for a follow-up postcard)	Details on who completed the surveys, payment report, website use report
<b>Data flow</b>	<ol style="list-style-type: none"> <li>1. People reported their test results and filled out surveys</li> <li>2. Data sent to DCRI</li> <li>3. Data used for reporting and analysis</li> </ol>	<ol style="list-style-type: none"> <li>1. Community partners recorded ZIP codes and number of test kits handed out</li> <li>2. People reported their test results and filled out a short survey (on website)</li> <li>3. People could choose to fill out extra surveys</li> <li>4. Data merged and reported to project team and community partners</li> </ol>

### KEY POINTS

1. Be aware of laws and regulations related to collecting data about people
2. Think about the *What, How, Who, and When* for collecting data in your program
3. Follow a process to select the data systems that will meet your needs, with help from people and partners skilled in data technology

### TOOLS AND TEMPLATES

GO TO:

**EXAMPLE DATA FLOW DIAGRAM**

## PLANNING

# Getting and Managing Program Supplies

### THIS SECTION WILL COVER:

Steps for getting supplies to community partners

How to make the distribution process go smoothly

Tips for managing supplies during the program



For large public health programs, getting, storing, and tracking supplies can be a big job.

Steps for this process include the following:

- Be aware of any financial rules and requirements of your grant
- Source supply vendors as early as possible that can meet quality standards, timeline, and budget
- Get details for supplies including size, weight, and number of boxes and pallets
- Find a warehouse or other storage option that meets size, security, and temperature control requirements
- Ensure delivery trucks have correct details about the warehouse (loading dock, dolly, hours, etc.)
- Identify a local community point person (or people) to manage and track delivery
- Determine if one or multiple deliveries will be needed



Have a backup plan whenever possible.

- Track all deliveries and count the supplies when received
- Create a process for community partners to get their supplies through delivery or pickup, for both the first time and resupply if needed
- Make a distribution schedule keeping in mind weekends, holidays, school schedules, and large social events
- Have a backup plan whenever possible
- Track supplies to know when or if resupply is needed
- Know when supplies will expire
- Develop plan for return of supplies at end of program

### KEY POINTS

1. Details and communication matter when managing program supplies
2. There are important steps before, during, and after giving out supplies
3. Start planning early and have team members who know their roles in tracking supplies

### RESOURCES

#### [Community Partner's Guide for Grants Management](#)

A guide from the University of North Carolina at Chapel Hill (2015)

# Creating a Communications Plan, Messages, and Materials

**THIS SECTION WILL COVER:**

How to create a communications plan and what to include in it

What key messages are and how to use them in your program

Things to know when choosing communications channels

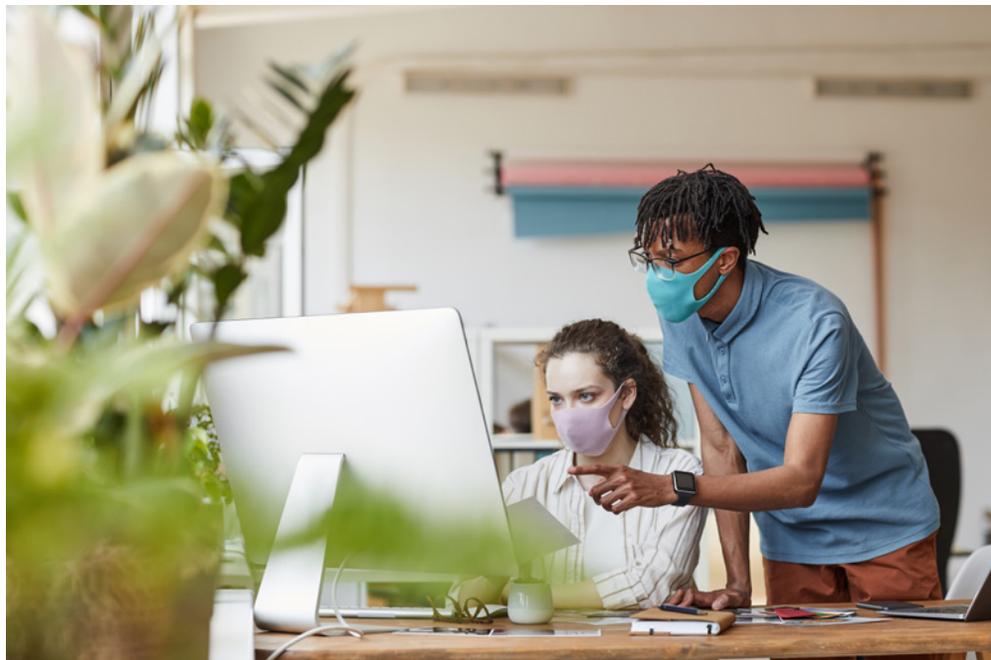


Marketing a public health program has two goals:

1. Make people aware of the program
2. Get people to take part in the program

Some programs may have other goals, such as urging people to make a behavior change or fill out surveys.

Health communicators play a vital role in public health programs. We suggest bringing them in early during program planning. Communications support may come from the overall program level, community partner level, or both. If you do not have access to this support in your group, you could partner with an academic or research group, communications agency, marketing firm, or other group. For SYCT and YMCF, our central program communications team drafted a communications plan and engaged community partners to help refine it.



## Creating a Communications Plan

A communications plan for a public health program should outline all the basics to inform this work, such as:

Question	Purpose	Examples
<b>Whom does the program most want to reach?</b>	Defines the primary audience	Migrant workers, parents of young children, nurses
<b>How do you define success?</b>	Informs goals and metrics	Migrant workers, parents of young children, nurses
<b>What does the program want community members to do?</b>	Guides key messages	Wear a mask, eat healthy foods, fill out a survey
<b>How do you want community members to feel when they think about the program?</b>	Sets the tone and voice	Excited, informed, hopeful

**TIP**

Check language usage data for the area to avoid printing too many copies in a language. You can check U.S. Census Bureau data or check with the county election board.

Answers to these questions help you create goals, write key messages, choose channels, and measure success.

While the communications plan is a helpful guide, there is no “one size fits all” approach for public health programs. A major part of planning communications is knowing the unique traits of each community and what communication methods (also known as channels) would work best. Community partners are key to this process because they can provide insight on:

- **Current and past issues faced by the community**
- **Which communication methods work best in their community**
- **Which groups of people are most important to reach**
- **Culture and language factors to be aware of**

With input from the community partners, you can adapt the communications plan to fit the community. The plan should address any translation needs.

**CASE EXAMPLE**

We had a few main goals for our marketing of YMCF and SYCT. We wanted to make community members aware of the free COVID tests, with a focus on minority groups. We also wanted to promote community partner events so the program could give out more tests. Lastly, we hoped to get people to use the tests often. We designed our materials to provide clear and concise information about the program in a tone that was personal and motivating.

## Creating Key Messages and Materials

Key messages are the basis for all program communications. They help ensure a consistent message across all channels (website, flyers, TV, social media, etc.). We suggest you develop key messages after you have a draft communications plan. Ask program leaders and community partners for feedback on the key messages. They can check that the messages are correct and make sense for the community. Getting the program team to agree on the key messages upfront will make it easier and faster to create other products.

As you create other products from the key messages, keep asking for input. Also, follow health literacy guidelines and take into account local culture or language factors. Have people on your team who are passionate about making sure materials are appropriate and easy to understand for everyone in the community. Translating, adapting, and designing materials for different people requires resources. You may need to find a dedicated partner who can support this work.

Health communicators play a vital role in public health programs.

### CASE EXAMPLE

**Our program focused on Spanish-speaking people. While we had planned to translate all products into Spanish, we learned that using a translation service is not always enough. A local Spanish speaker reviewed our text to make the translated content better fit local usage.**

We were also able to enhance our materials by working with the maker of the COVID tests. They gave us details for our frequently asked questions section of the website, beyond what was in the test's user instructions. They also created a video we could share to show how to use the tests. People found the video very helpful.





## Choosing Channels

Programs have only so much time and money they can spend on marketing. For small or grassroots groups, it may not be much. It can be a challenge to know which communications channels are best to include. The table in this section lists many options, though not all of them may be available in your communities. We checked into possible channels in each community and showed these as a menu of options to our lead community partners for input. The partners told us about any channels we may have missed and gave advice on where to focus.

Our program was lucky to have an advertising budget. But, there are still many ways to market your public health program without access to paid advertising. Community partners can often connect with local media, get people to share on social media, and spread messages by word of mouth. You can research and onboard local influencers to help. These may include local celebrities, business owners, musicians, artists, and more.

Find out if there are active online groups in the area for posting about the program. These could include neighborhood watch, buy/sell/trade, veterans, community news, and foodie groups. Go to where the people are! Have speakers talk about the program at celebrations, festivals, music/art studios, etc. Put flyers in coffee shops, veterans halls, libraries, restaurants, etc.

Some paid channels such as social media can also work with lower budgets. You can dial marketing up or down during your program based on needs and budget.

Go to where the people are!

### TERMS

#### Communication channel

Media through which you can send a message to its intended audience, such as phone calls, text messages, emails, television, newspaper, radio, and social media.

**Example Communication Channels**

Channel	Things to Know
<p><b>Local media</b></p>	<ul style="list-style-type: none"> <li>• Paid and unpaid options</li> <li>• Can create trust by showing known local people</li> <li>• News coverage sparks excitement and interest</li> <li>• Includes non-digital options (radio, TV, newspaper)</li> <li>• Audience can be too wide if program is for a small area or group</li> </ul>
<p><b>Program website</b></p>	<ul style="list-style-type: none"> <li>• Serves as a central source of program information</li> <li>• Should include a clear call to action</li> <li>• Must be user friendly including on mobile devices</li> <li>• Can be updated as needed</li> <li>• Can cost a lot of time and money to create</li> <li>• Requires expertise or tech support</li> <li>• Provides detailed metrics</li> </ul>
<p><b>Social media</b></p>	<ul style="list-style-type: none"> <li>• Paid and unpaid options</li> <li>• Able to select types of people to focus on</li> <li>• Can be less costly</li> <li>• Able to update as needed and test different messages</li> <li>• Challenging to monitor and moderate</li> <li>• Provides detailed metrics</li> </ul>
<p><b>Direct mail</b></p>	<ul style="list-style-type: none"> <li>• Can buy mailing lists</li> <li>• Wide audience</li> <li>• Non-digital</li> <li>• Costly</li> <li>• Hard to measure success</li> </ul>
<p><b>Digital advertising</b></p>	<ul style="list-style-type: none"> <li>• Many options, such as search, video, audio, and email ads</li> <li>• Able to select types of people to focus on</li> <li>• Can update as needed and test different messages</li> <li>• May seem less personal</li> <li>• Harder to get people's attention</li> <li>• Provides detailed metrics</li> </ul>
<p><b>Outdoor advertising</b></p>	<ul style="list-style-type: none"> <li>• Many options, such as billboards, posters, transportation ads, door hangers</li> <li>• Wide audience</li> <li>• Able to attract many views</li> <li>• Non-digital</li> <li>• Can be costly</li> <li>• May take longer to set up</li> <li>• Hard to measure effectiveness</li> </ul>

## Providing Templates and Branded Materials

Creating and sharing templates has many benefits for a public health program, such as:

- Makes it simpler and quicker to roll out a program in more than one community
- Makes it easier for community partners to take part in the program, even if they have little time
- Helps keep materials in line with approved messages
- Creates a known brand

### CASE EXAMPLE

We created a communications toolkit to help community partners promote the program. It had social media posts, pictures, videos, email text, flyers, and posters. We encouraged partners to adapt these or create their own as desired. They also got a set of branded items to help spread awareness for the program and attract people to events.

**Examples of Branded Items.** Face mask, sticker, feather flag, selfie sign.



## Choosing Metrics

Before you start marketing, see which metrics you can use to find out how well channels are working. We suggest choosing metrics that you can view early and throughout the program so you can change course if needed. You may set goals for your efforts based on benchmarks or rates from other programs. But, in some cases, it can be hard to find a good way to compare your results.

Metrics not only show the overall success of your work, but they can also show success rates for different messages or designs. You can use tests to compare options and select the ads that work better. This is called A/B testing. You may be surprised by the results, but numbers don't lie!

### KEY POINTS

1. Community partners should inform the communications plan
2. Getting sign off on key messages will make creating other products go more smoothly
3. There are many marketing options, including ones that can work for programs with small budgets

### TOOLS AND TEMPLATES

**GO TO:**

**EXAMPLE COMMUNICATIONS PLAN**

**EXAMPLE COMMUNICATIONS CHANNELS, TIMING, FREQUENCY, & EVALUATION**

### RESOURCES

**[Health Literacy](#)**

Information from the Centers for Disease Control and Prevention

**[Clear Communication Resources](#)**

List of resources from the National Institutes of Health

**[Toolkit for Making Written Material Clear and Effective](#)**

From the Centers for Medicare & Medicaid Services

**[Limited English Proficiency Translation Resources](#)**

A list of resources (“I speak” cards, translation guides, etc.) from the U.S. Department of Justice

**[Resources for Testing Messages and Materials](#)**

From the Centers for Disease Control and Prevention

**[How To Test Your Communications Guide](#)**

From the Public Interest Research Centre

## PLANNING

# Getting Approvals

### THIS SECTION WILL COVER:

Types of approvals that public health programs may need

How including research in your program affects reviews and approvals



### TIP

To save time, we submitted our overall program design for IRB review first. Then, once we created and translated all public-facing materials, we submitted an amendment so they could also be approved.

If research will be a part of your program, then your team will need to have people who know how to complete all requirements. This will include submitting to an institutional review board (IRB). IRB review ensures the rights and welfare of all people in research are protected. Knowing which public health work needs IRB review can be complex. If you do not have experience with this, then we advise partnering with a group that does. When in doubt, it is always best to seek guidance from the IRB. Even research that may be “exempt” still must go through IRB review to get this label. Academic and research groups will have access to an IRB, and there are also independent IRBs.

If IRB review applies to your program, you should account for the process in your timeline. You will also need to know whether people in your program need to give informed consent. If informed consent is needed, then you must have processes and tools in place to collect it. Methods include a website or call center with trained consent staff.

Other types of approvals to think about include gaining permission from places to hold events. Events may also require special insurance.

### KEY POINTS

1. If you're not sure if your program needs IRB review, then check with an IRB
2. Programs that have research in them will need team members or partners who know the requirements and research review process

### RESOURCES

#### [Frequently Asked Questions About Institutional Review Boards](#)

From the American Psychological Association

#### [Basic Research Concepts Training](#)

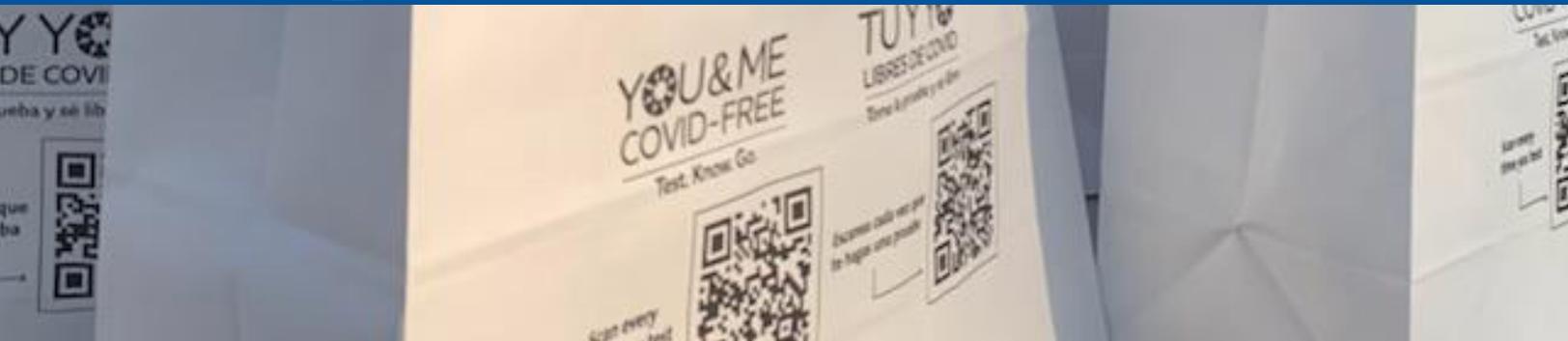
From the U.S. Department of Health and Human Services

#### [Human Research Protection Training](#)

From the Office for Human Research Protections



# Implementation



## IMPLEMENTATION

# Orienting Community Partners

### THIS SECTION WILL COVER:

Why giving an orientation for community partners is important

What to tell partners during program orientation



Your program should create an onboarding process for all community partners. Partners who have signed on should already know the basics of the program and their role. Now, you will share the details of the program and the processes and procedures they should follow. Be clear about program goals and what you expect from them. At the same time, listen to any concerns or advice they share.

We suggest that the lead community partner or other program operations staff give the orientation. Consider the ideal format—virtual, in-person, or both options. You may need to hold a few sessions on different days (weekday and weekend) and times (day and evening) to give your partners options that work for them. Community partners only need to have a one person from their group attend. That person can share information with others in their group as needed. Partners often have experience running outreach programs in their community. So, you can focus on the details related to your program and don't need to cover basics on how to run a volunteer effort.

### Topics to cover:

- What is requested of partners at each step of the program
- How to get program supplies
- How to track and report metrics on their work
- How partners will interact with community members
- What data to collect from people
- What is requested of people who take part (partners may need to explain or answer questions from community members)
- What tools, information, and materials are available to help the partners
- How to help publicize the program
- How to deal with religious, political, or racial factors
- How to respond to health myths and misinformation
- How they will receive updates on program progress
- Who to contact if they have questions or issues

**CASE EXAMPLE**

Our program focused on Spanish-speaking people. While we had planned to translate all products into Spanish, we learned that using a translation service is not always enough.

A local Spanish speaker reviewed our text to make the translated content better fit local usage. We were also able to enhance our materials by working with the maker of the COVID tests. They gave us details for our frequently asked questions section of the website, beyond what was in the test's user instructions. They also created a video we could share to show how to use the tests. People found the video very helpful.



**KEY POINTS**

1. Use the partner orientation to share all the details they will need to know for their work
2. Always keep your ears open for input from partners
3. Give different options for completing the orientation to make it easy on partners

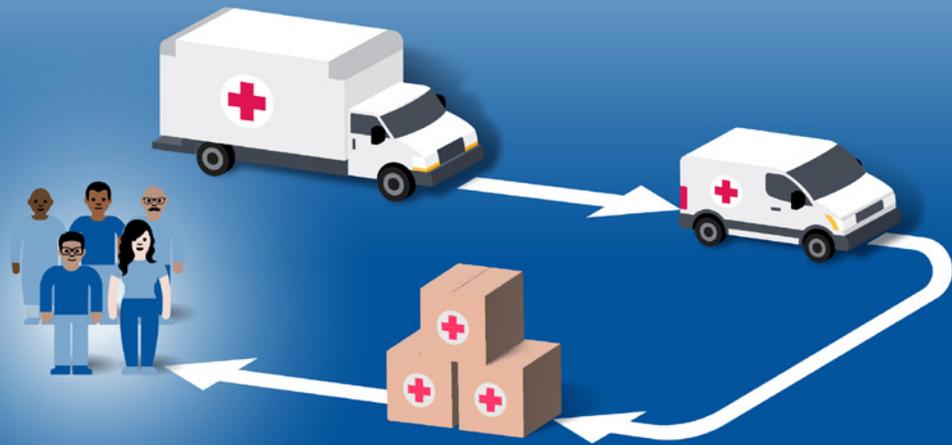
## IMPLEMENTATION

# Giving Out Program Supplies and Tools

### THIS SECTION WILL COVER:

How to figure out the amount of supplies to give each partner

Tips to help supply distribution go smoothly



Estimating the amount of supplies that each partner will need can be quite a challenge. On one hand, you don't want partners to run out of supplies and risk slowing them down. On the other hand, moving unused supplies around among partners can be a big headache. Have a plan for resupply so partners do not order too much to start out.

For programs that involve partners giving things out to community members, we suggest that partners ask for supplies for no more than 30% to 50% of their group's reach. Also look at each partner's number of planned events to figure out the supplies they'll need.

Be sure to provide specific details about the pickup or delivery of supplies. For instance, needing a large truck, having a loading dock, and having staff there for delivery. Partners also need to know the storage requirements for supplies. For example, using a clean, dry storage area with security measures in place. Share details on any temperature control needed. Your program may have other requirements based on the type of supplies.



Partners should have completed onboarding and signed any program agreements before getting their supplies. They should inventory the supplies upon receipt. Ask them to confirm that the amount they got matched what was expected.

We learned to give community partners a partial payment at the start of the program instead of waiting until the end. These funds help partners with planning events and other program work.

### CASE EXAMPLE

Even with detailed planning, there will likely be challenges and surprises. For example, in SYCT, we had carefully planned how much supplies each partner should get.

Yet, we hit a snag when FedEx passed our shipments on to USPS. The smaller town's postal service did not have trucks or staff that could deliver the volume of boxes we sent. So, they called each partner to come pick up their supplies from the post office. This was alarming to our partners, who were expecting supplies to arrive at their doorstep.

After some confusion and many phone calls, one partner rented a U-Haul to pick up all supplies from the post office and deliver them. We were lucky to have a committed partner who saved the day. This shows the importance of partners, strong communication, having a backup plan, and being able to pivot when barriers arise.

### KEY POINTS

1. A group's reach and their number of events should inform the amount of supplies they need
2. Give partners specific details for supply pickup or delivery and storage
3. Expect hiccups, have a backup plan, and be ready to adjust

## IMPLEMENTATION

# Publicizing Your Programs and Events

### THIS SECTION WILL COVER:

Ways to get the word out about your program

How to plan a launch announcement

Tips for keeping promotion strong throughout the program



Telling the community about your program is critical to its success. By now, you will have laid the groundwork for your program's communications. You created a communications plan, messages, and materials. Now it's time to put these into action.

## Setting Up Social Media

Before program launch, decide if you'll set up new social media accounts for your program or use your partners' or your own group's accounts. While having social media accounts (Facebook, Twitter, Instagram, etc.) focused on your program is an option, building them up from scratch can be very hard. Using accounts that already have a following is quicker, and may be more trusted by community members. For short projects (less than 1 year), it may not make sense to try to build a social media presence from zero. Setting up and managing more accounts also requires more effort. You'll need to decide what's best for your program after weighing the pros and cons.



Example Social Media Image

## Announcing Program Launch

A launch announcement is as a formal kickoff for your program in a community. Its purpose is to attract interest, create excitement, and show local support for your program. Starting with your program's launch, foster connections with local media. Be sure to include minority-owned and minority-focused outlets. Having community leaders (local government, religious leaders, school officials, etc.) state their support for your program will convey trust and significance. Options for a launch announcement include a press release or other written communication, a recorded statement, a social media blitz, a live event, or a mix of these. Or, your team could come up with its own new approach. What method will work best to reach the people you want? You can also use a few methods to reach different groups.

Choose a date and time for your announcement and alert local media in advance. Make sure all partners are prepared with tools, messages, and templates to help spread the news. A launch announcement can take weeks or even months to plan. For a live event, trying to align the schedules of community leaders can be quite tricky.

Starting with your program's launch, foster connections with local media.

### CASE EXAMPLE

The Centers for Disease Control and Prevention (CDC) and the National Institutes of Health (NIH) teamed up for the SYCT launch. They co-led a national press release to announce the program.

The Pitt County Health Department issued a press release and hosted a press conference on launch day. They timed it to land on their weekly COVID-19 press briefing. The Hamilton County Health Department announced their launch soon after, using the same method.

Local health department directors served as the main voice for the program in their areas. Other local leaders also spoke about the importance of the program and shared personal stories. We issued press releases throughout the program to announce milestones, promote events, close the program, and thank our partners.

## Promoting Events and Ongoing Communications

To promote events, create clear lines of communication within your team. Team members who update the program’s communications channels need details on program events, locations, and hours. Communications staff should have a way to get updates from community partners, and vice-versa.

Volunteers and community partners are an underrated asset in marketing and outreach. Give them a hashtag and encourage them to take photos, promote local events, share information about the overall program, and promote more engagement from the community.

Sharing stories of the program’s local impact can prompt more people to take part. As much as you can, include community member words, voices, pictures, and videos in your communications. Messages work best when people hear them from their friends, neighbors, and trusted leaders.

Remind partners to use program materials and templates. These should make it easy for partners to share program news through their channels (social media, websites, newsletters, email lists, etc.). Make sure partners know how to access or request the resources. To attract people to events, use signs in high traffic areas (busy street, break room, etc.).

Volunteers and community partners are an underrated asset in marketing and outreach.



## Assessing and Adapting the Campaign

A program’s communications methods should be fluid. The near real-time metrics of many channels allows you to assess and adjust your approach as needed. We checked metrics as often as daily at the start, and then once a week as the program went on. Based on these metrics (see example report), we made changes such as dropping channels, trying new messages, and testing other channels . We also moved ad dollars around and extended or shortened our marketing efforts.

Digital channels let us be most nimble. We could quickly switch out designs, turn off ads, or boost frequency. For some communities, there was a question at program launch of whether we would need paid advertising. By having a plan and templates ready, we were able to launch ads quickly if the need arose. Sharing our metrics with leaders throughout the program helped us show the value of communications efforts.

### KEY POINTS

1. Plan a launch that will start your program off strong
2. Connections with local partners, leaders, and media are key to communications efforts
3. Use metrics to see what’s working and be ready to change things up as needed

### TOOLS AND TEMPLATES

GO TO:

**EXAMPLE COMMUNICATIONS TOOLKIT**

**EXAMPLE COMMUNITY PARTNER e-TOOLKIT**

**COMMUNICATIONS CHANNELS**

## IMPLEMENTATION

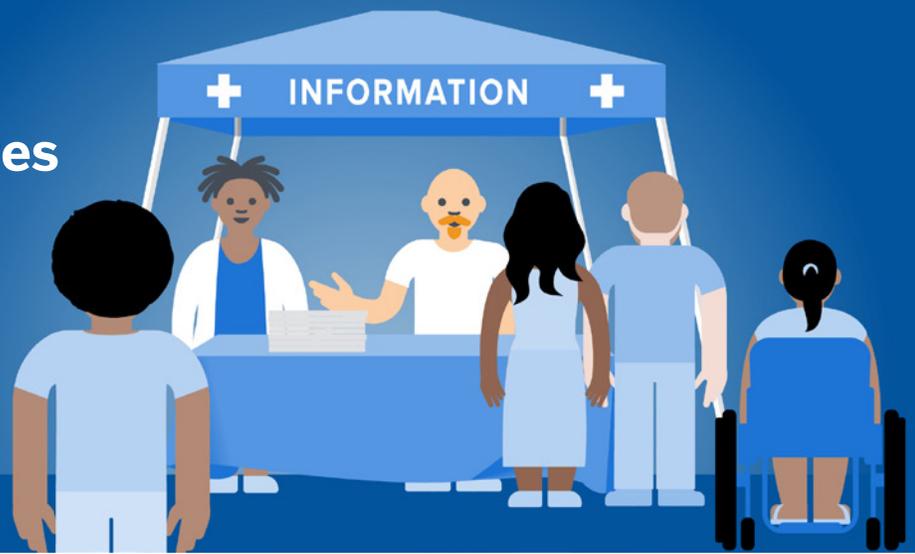
# Running Program Sites and Holding Events

### THIS SECTION WILL COVER:

The difference between program sites and events, and how they can be used

How to make program events a success

Tips for setting up sites



Local sites and events bring your program to community members. Community partners play a critical role in making this happen. They are the boots on the ground and the face of the program in the community. Most community groups have experience holding outreach events. But, a public health program or working in a health crisis may be new for some.

Program sites are places that have regular hours, whereas program events happen once or for a short time. Depending on your program and community, one or both of these may work best (we used a mix). We suggest looking for ways to pair program events with other community events. You can get more people and provide other needed services to community members (vaccine clinics, food pantry, etc.).

Work closely with the program's communications team as you plan your program sites, hours, and events. This will help assure the information gets posted and spread through the community. With all the effort you and your partners are putting into setting up program sites and events, you want to make sure people show up! So, keep a strong link between program operations and communications staff.

Sample steps for preparing program sites and events:

### **Determine site hours and staffing needs**

- **Set up some consistent hours covering as many days of the week as possible**
- **Try to include hours that allow people to visit after school or work**
- **Have support for non-English speakers on site, such as bilingual volunteers, professional translators, or live translator iPads**
- **Maintain a flow of information with the program's communications team who can help publicize events**
- **Understand any training requirements for volunteers**
- **Determine a volunteer check-in and check-out procedure**
- **Make sure all staff know whom to contact if they have questions or issues**
- **Keep public information up to date, including notices about any cancelled events or closed/out-of-stock sites**



### Set up delivery stations

- Pick a place to greet people and hold program activities. When infection control is a concern, outdoors can be a great option, if weather allows
- Use highly visible signs to show people where to go
- Ensure all needed supplies will be on site, and allow enough time for setup
- Follow safe practices, such as wearing face masks, social distancing, and hand sanitizing, as appropriate
- Create a plan for visitors to flow through the area to prevent crowding
- Be creative (drive-thru event, booth at farmer’s market, table at Easter gathering, etc.)

A public health program is a learning process that will involve adapting, no matter how much planning took place. These programs benefit from sharing lessons learned, as described later in this toolkit.

#### KEY POINTS

1. Community partners bring public health programs to people
2. Try a variety of sites, events, and hours—and don’t forget to publicize them
3. Follow best practices for site setup, while being creative when needed

#### TOOLS AND TEMPLATES

GO TO:

**EXAMPLE  
SITE PROCEDURES**

## IMPLEMENTATION

# Collecting Data and Tracking Progress

### THIS SECTION WILL COVER:

How you can use metrics to inform the ongoing conduct of your program

Ways to provide data reports and how they can be helpful



Metrics help you track the progress and success of your program. During planning, you chose some useful measures of success. These metrics could be operational, such as the number of people who took part. Or, they could be health-related, such as the number of positive test results. A mix of both types will likely work best for most programs. In YMCF, some of our most important metrics were the number of community partners and the number of tests given out.

Once your program is underway, you'll collect and report data for your metrics.

## Data Reports

Monitoring data during a public health program can offer insights into how the program is performing so you can change course if needed. The table lists sample metrics that could be useful to monitor during a program. There are special tools for creating visual reports. But, if you do not have access to one of these, simple reports and charts using a common software like Excel can also work fine.

With visual reports and charts, you can see which partners have been most successful and which may need more support or guidance. You can also check on how data collection is going. If missing data is an issue, you can give reminders to partners. Sharing access to the program's data reports and visuals with community partners can help them see the importance of data collection with their own eyes. They can also watch their growing contribution to the program's overall goals.

If missing data is an issue, you can give reminders to partners.

Examples of Useful Metrics for Reporting

Metric	Measure
Key program-related health outcomes	Counts and %
Number of people engaged	Count
Number of people engaged by each community partner	Count
People filling out survey that completed it	%
People filling out survey that left it incomplete	%
Types of people (by age, race, income, education, etc.)	Counts and %
Location (ZIP code) of people	Count

CASE EXAMPLE

In response to requests for the ability to view up-to-date program metrics, we created an interactive dashboard. It allowed users to filter data, create charts, and view selected metrics. We used a software to combine data from all three of the program's data collection tools.



The YMCF team and partners gave input on what metrics to include so we could create useful reports. Some of the key metrics were tests given out (by partner, date, and ZIP code), COVID-19 test results, survey data, and reasons for taking a COVID-19 test.

Users could view their own (and others') progress. The dashboard allowed the team to discuss changes to operations based on live data.

KEY POINTS

1. Ask for input so you can create data reports and visuals that matter to everyone involved with the program
2. You can use metrics while the program is still happening to see areas to improve

TOOLS AND TEMPLATES

GO TO:  
[EXAMPLE PROGRAM DASHBOARD](#)

# Gathering Real-Time Feedback and Sharing Up-to-Date Information

## THIS SECTION WILL COVER:

How ongoing 2-way communication can greatly benefit your program

Ways to give updates to partners and get their feedback



Gathering real-time feedback from community partners can help the program address any issues. For example, the program team could help a site that has run out of supplies by working with them to adjust their events until more supplies arrive. Partners can also point out ways to improve. For instance, sites who have had great success can share tips for sites who are having a harder time.

On top of getting feedback from your partners, you should also share regular program updates with them. In our programs, partners were eager for information on how the program is doing. They want to know if the program is reaching its goals and making a difference in the community. Being able to see their efforts have an impact can be motivating, as can seeing where more progress is needed.

To maintain a flow of information within your program, set up regular modes of communication and build a plan for each mode. Complex programs will benefit from using multiple modes of communication, often for different purposes. See the table for some options along with pros and cons for each.



**Methods for Gathering Feedback and Sharing Information**

Mode of communication	Pros	Cons	Tips
<b>Email</b>	<ul style="list-style-type: none"> <li>• Simple to set up</li> <li>• Everyone already has it</li> <li>• Can have a regular schedule for updates</li> </ul>	<ul style="list-style-type: none"> <li>• Email fatigue</li> <li>• Easy for messages to get lost or be ignored</li> <li>• Less conversational</li> <li>• Requires internet connection</li> </ul>	<ul style="list-style-type: none"> <li>• Consider setting up a central program inbox that will be monitored</li> </ul>
<b>Program website</b>	<ul style="list-style-type: none"> <li>• Widely available</li> <li>• Partners do not need training or special tool</li> <li>• Can be a central hub for information</li> </ul>	<ul style="list-style-type: none"> <li>• One-way communication (program@community partners)</li> <li>• Need communications staff/support</li> <li>• Requires internet connection</li> </ul>	<ul style="list-style-type: none"> <li>• Use in combination with other methods</li> </ul>
<b>Other tools (Slack, Facebook, Airtable, Microsoft Teams, SharePoint, etc.)</b>	<ul style="list-style-type: none"> <li>• Speed of communication</li> <li>• Open dialogue</li> <li>• Available 24/7</li> </ul>	<ul style="list-style-type: none"> <li>• Learning curve</li> <li>• Adoption hesitancy</li> <li>• Requires internet connection</li> <li>• May require buying a license</li> </ul>	<ul style="list-style-type: none"> <li>• Decide on a tool early and use it for the program's duration</li> </ul>
<b>Phone calls</b>	<ul style="list-style-type: none"> <li>• Widely accessible</li> <li>• Encourages open 2-way conversation</li> </ul>	<ul style="list-style-type: none"> <li>• Can be more time consuming</li> <li>• Dependent upon availability to talk</li> </ul>	<ul style="list-style-type: none"> <li>• Ask your partners which communication methods they prefer</li> </ul>
<b>In person</b>	<ul style="list-style-type: none"> <li>• Shows support and appreciation</li> <li>• Strengthens relationships</li> <li>• Encourages open 2-way conversation</li> </ul>	<ul style="list-style-type: none"> <li>• More time consuming</li> <li>• Can be challenging in terms of schedule, travel, and cost</li> </ul>	<ul style="list-style-type: none"> <li>• Don't discount the benefits of getting some face time with your partners when possible</li> </ul>

**CASE EXAMPLE**

For YMCF, the program team produced a weekly email newsletter. It provided updates to all community partners and others involved in the program. We created a template and planned a schedule for the whole program. The newsletter included a variety of items, as follows:

- Thermometer showing progress
- Data-driven visuals with information on program reach and impact
- List of upcoming events with link to program website
- Pictures or videos from recent events
- Important reminders
- Social media posts for sharing
- Quotes from leaders and community members to show gratitude and give encouragement

**Example Content Schedule for Community Partner Email Newsletter**

Week	Topics	Featured Quotes
1	Communications tools and templates, getting started	None
2	Distribution continues, Thanksgiving	Program's engagement lead
3	End-of-year push	School superintendent and program's operations lead
4	Program midpoint update	Mayor and program's communications lead
5	Holiday campaign rollout	County Commissioner and program leader
6	Final days of distribution, metrics	Lead community partner Executive Director and program director
7	Closing, community impact	Local pastor and operations team member

**KEY POINTS**

1. You can learn from partners to improve the program
2. Your partners want to know how the program is going
3. Use different modes of communication based on their features

**TOOLS AND TEMPLATES**

**GO TO:**

**EXAMPLE COMMUNITY PARTNER NEWSLETTER**



# Closing and Beyond

# Thanking Partners and Maintaining Relationships

**THIS SECTION WILL COVER:**

Why it is important to thank community partners and how to do it

How to create an exit plan that respects community partners

Ways to keep up relationships with partners



## Thanking Partners

Community partners make these programs possible. Recognizing their hard work is so important. Don't neglect this step in a rush to move on to your next project or write up your results. Give some love to your partners and show them how much their help mattered. This will not only let them know that your program truly valued their efforts, but also keep the door open for working together again.

### CASE EXAMPLE

In our programs, we set aside resources for a few ways to thank community partners:

- Produced a thank you video with photos from local events to capture the partners' hard work
- Held celebrations that brought local partners and the whole program team together. We invited local political leaders to give more attention to the important role of the local groups.
- Shared stories about the positive impact of the program
- Gave out certificates and other gifts
- Paid partners for their time and commitment to the program
- Let partners keep leftover supplies if desired



## Maintaining Relationships

Avoid building relationships with a community and then never touching base again after your program ends. This shows a lack of respect and hurts the goodwill created during the program. Ending the connection would not only be rude, but it would also mean passing up on chances to make an impact through future work together. We suggest working with the lead community partner to create an exit plan for the program. The plan should describe how you will keep up the bond and communication with partners.

One method is to create a community advisory board that will continue after the program ends. Members could co-develop and provide input on future projects.

Every program is the chance to create a network. Show that you value the relationships built during your program by putting effort into sustaining them. Even if you don't have a plan for a next step right away, it is still important to keep the connection.

Every program is the chance to create a network.

### CASE EXAMPLE

For our programs, the exit plan included the following:

- Urged partners to continue working together to address other community issues
- Agreed to check in every so often, including sending local groups information on other funding opportunities
- Followed up with partners in the weeks and months after the program ended to check on community progress
- Set up an annual meeting with all partners as a group for updates on the community as a whole and each partner

### KEY POINTS

1. Community partners deserve a big thank you
2. Treat your partners with respect when the program ends and after
3. Don't close the door on the relationships you built in the community

# Assessing Metrics and Recording Lessons Learned

**THIS SECTION WILL COVER:**

What to review when the program ends to learn what worked and what didn't

How to capture lessons from your program to inform future work

## Assessing Metrics

When the program ends, it will be time to review the metrics for success that you set up in the planning phase and see how the program did. Key questions will be:

- Did the program reach the people you wanted?
- Did it help people most affected by the health problem?
- What methods worked best to reach community members?

## Recording Lessons Learned

To start up a public health program quickly and have success, one must apply lessons learned from past work. This could include other programs or other communities within your current program. We suggest carving out time to reflect between the end of one program and the launch of the next. A robust review can help you improve future programs. Ask yourself, How do we refine this process over time?

**Consider the following methods for collecting lessons learned:**

- Record successes and challenges throughout the program
- Hold debrief sessions with lead community partners, the program team, and leaders to hear what worked well and what did not
- Send a feedback survey to community partners

**CASE EXAMPLE**

We asked for feedback from community partners after our programs ended. This process gave us information to help us to refine and enhance the program operations. We were able to quickly enact changes for the next program launch. We collected lessons learned that would have both short- and long-term use.

Then, we created this toolkit to share our lessons with others. The success of a public health program depends upon the open sharing of ideas from a variety of perspectives. We convened partners from all communities in our programs at a summit for this purpose. The group discussed lessons learned, knowledge gaps, and next steps for working together to benefit public health.

**KEY POINTS**

1. Keep track of what you learned throughout your program and make an extra effort to capture lessons when the program ends
2. There are different ways to ask community partners and team members for feedback
3. Applying the knowledge from the current program will jump start the success of future ones

**TOOLS AND TEMPLATES**

**GO TO:**

**EXAMPLE DEBRIEF SESSION QUESTIONS**

**EXAMPLE COMMUNITY PARTNER FEEDBACK SURVEY**

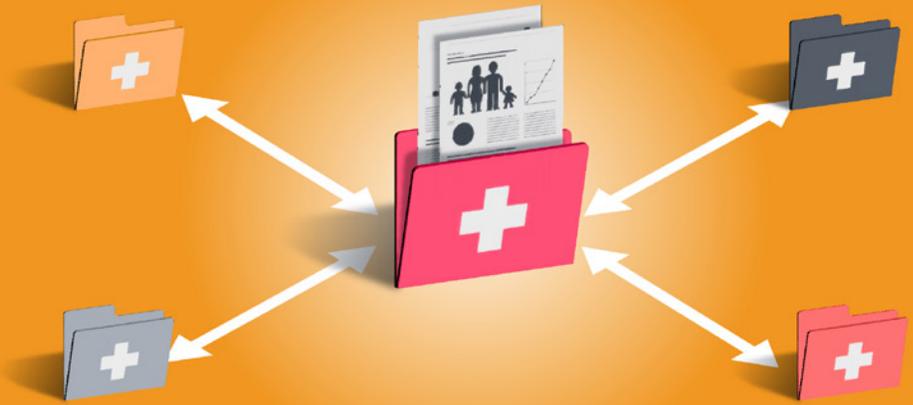
# Sharing Findings

**THIS SECTION WILL COVER:**

Why you should share findings from your program, and with whom

Tips on what to think about when making a plan to share findings

Different ways to return results and how each one works



Sharing your program's findings should not be an afterthought. Returning results is a must for a number of reasons:

- **People who took part will want to know the results**
- **The community deserves to know how the program affected public health**
- **It shows that you value transparency and trust**
- **It shows respect for the relationship**

Spreading what you learned will help also your program's results add to public health knowledge. This way, future work can build on your efforts. Sharing your results can prompt wider uptake of a method that improves public health. Or, if the work was not a success, show others that different approaches are needed.

You should always reserve some of your effort and budget for returning results. The table shows some ways you can share findings and things to know for each method. We suggest creating a plan for the return of results with input from your partners. Your program's funding agency may also have requirements that you must address.

You'll use different products and methods to reach your various audiences. For example, a lay summary written in plain language can help return results to community members. A journal article would contain details for the scientific community. When sharing findings with community members, follow health literacy guidelines and take into account local culture or language factors.

While it's important to share scientific results, don't neglect the chance to share stories about how the program affected people and changed lives. Personal stories are more relatable and can be a powerful tool. Even if your program was not a success by the numbers, the work brought the community together and likely helped someone. Also, even sharing negative findings can open doors for future efforts.

**You should always reserve some of your effort and budget for returning results.**

**Examples of Ways to Return Results**

Channel	Things to Know
<b>Local and national media</b>	<ul style="list-style-type: none"> <li>• Wide audience</li> <li>• Can attract a lot of attention</li> <li>• Could be a challenge to get coverage</li> </ul>
<b>Program website</b>	<ul style="list-style-type: none"> <li>• Already set up and familiar to the community</li> <li>• Your program’s central hub for information</li> <li>• Easy to promote and share</li> <li>• Is a more passive method</li> </ul>
<b>Social media</b>	<ul style="list-style-type: none"> <li>• Already set up and familiar to the community</li> <li>• Easy to promote and share</li> <li>• Requires monitoring and moderation</li> </ul>
<b>Direct mail</b>	<ul style="list-style-type: none"> <li>• Possible if you collected addresses</li> <li>• Sent right to your audience</li> <li>• Can feel more personal</li> <li>• Costly</li> <li>• Not easy to share with others</li> </ul>
<b>Email</b>	<ul style="list-style-type: none"> <li>• Easy if you have a mailing list</li> <li>• Most people are comfortable with this method</li> <li>• Easy to share with others</li> <li>• Messages may get lost or ignored</li> </ul>
<b>Virtual or in-person events</b>	<ul style="list-style-type: none"> <li>• Allows for dialogue</li> <li>• Could enhance trust</li> <li>• Option for a variety of audiences</li> <li>• Must promote to attract attendees</li> <li>• In-person events can be costly or a lot of work to set up</li> </ul>
<b>Scientific or academic presentations</b>	<ul style="list-style-type: none"> <li>• Works for scientific and academic audiences</li> <li>• May be able to share results part-way through the program</li> <li>• May require a travel budget</li> </ul>
<b>Journal articles</b>	<ul style="list-style-type: none"> <li>• Works for scientific and academic audiences</li> <li>• Trusted</li> <li>• May be picked up by national media</li> <li>• Looks good to future funders</li> <li>• Getting published can take a long time</li> </ul>

CASE EXAMPLE

We shared our results in a virtual summit with community partners. At the summit, partners also shared lessons learned to help future programs. We learned to allow even more time at these events for discussion and—most importantly—listening.



We will also share results through journal articles and presentations at science and public health meetings. Lastly, we will post results on the program website.

KEY POINTS

1. Consult your partners to make a plan for sharing program findings back to the community
2. Use more than one method for returning results so you can reach different audiences



## Toolkit Contributors

Contributors listed alphabetically

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We extend our thanks to all the SYCT and YMCF community partners.

# Tools and Templates

Free, rapid, at-home COVID-19 test kits are now available to Greenville-Pitt County households. at your family and

If we can stay right here where we live, we can meet the challenge and get your free test kit today, supplies last.

Get your free test kit at [covidtestpitt](https://covidtestpitt.com)

COVID-19 test kits are being provided courtesy of the Pitt County Health Department

SAY YES TO COVID TESTING  
THE FREE AT-HOME TESTING CHALLENGE  
Pitt County

# Community Evaluation Template

	Community 1	Community 2	Community 3
<b>Community description</b> (urban, rural, etc.)			
<b>Population</b>			
<b>Average age of residents</b> (years)			
<b>Median annual household income</b>			
<b>Poverty rate</b>			
<b>Race/Ethnicity statistics</b>			
<b>Specific health measures related to your project</b> (eg, vaccination rates, infection rates)			

[DOWNLOAD](#)

RETURN TO: [CHOOSING A COMMUNITY](#)

# Lead Community Partner Description

## Example from the You & Me COVID-Free Program

### Purpose

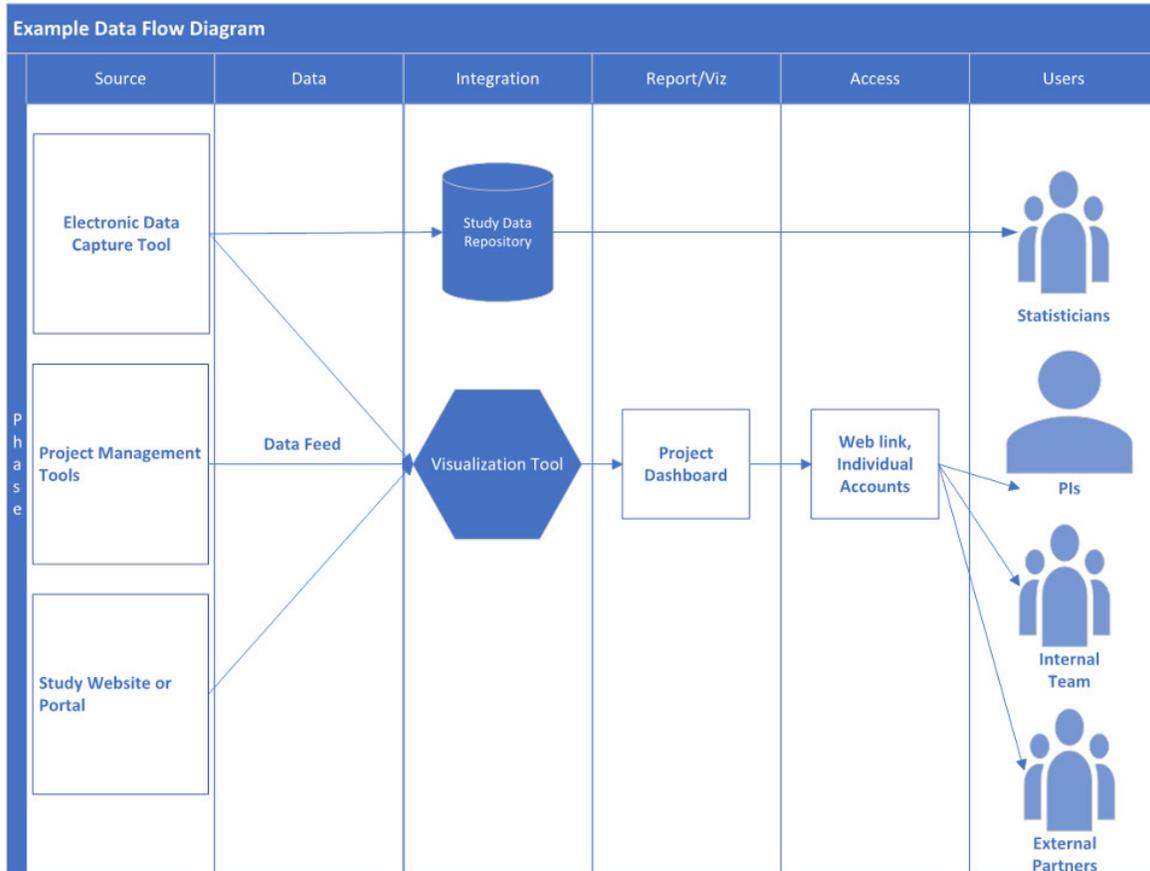
We seek a local organization to provide leadership in the coordination of an at-home COVID-19 test kit distribution program. The organization will partner with other community organizations and key stakeholders in organizing and managing a comprehensive distribution plan that prioritizes vulnerable populations of the local community who are deemed at higher risk for the disease. This intervention seeks to mitigate the further spread of COVID-19.

### Responsibilities

- Plan and participate in all meetings/conference calls with organizing team and or other project partners
- Develop and implement overall coordination of the distribution plan for no more than 200K COVID-19 home test kits
- Provide supervision to all local team members engaged in the project including Lead Community Partner staff, volunteers, and community partners
- Adhere to the approved budget
- Select capable and trusted community partners to participate in project planning and distribution of the kits
- Support planning and implementation of community opportunities/events to distribute product
- Document distribution events (photos, videos, social media, news articles, etc.)
- Identify community members/influencers willing to share personal stories for media, including social media, and to publicize/market project in promotional materials
- Provide site management to coordinate the activities and distribution events while supporting partner groups through technical assistance/troubleshooting
- Provide logistics support including safe, secure, temperature-controlled storage; receiving and transportation of kits; and guaranteeing correct number of kits go to designated locations and are transported to correct location
- Provide a final report detailing the distribution plan and best practices from the project

RETURN TO: [FINDING KEY PARTNERS](#)

# Example Data Flow Diagram



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RETURN TO: [ASSESSING DATA NEEDS AND SYSTEMS](#)

# Example Communications Plan

## Say Yes! COVID Test Communications Plan

### Goal/Objectives

The purpose of this communications plan is to help execute a public information campaign supporting a public health initiative that involves frequent at-home testing for COVID-19 in two pre-selected communities. The Say Yes! COVID Test public health initiative intends to determine whether frequent at-home testing for COVID-19 can decrease community spread of the virus by triggering early isolation and other precautions, including for individuals who do not have symptoms. The public information campaign aims to achieve the following objectives:

- Increase awareness of free at-home testing kits, with a focus on underserved communities
- Facilitate test kit orders or pick-up
- Encourage regular test kit use even if no COVID-19 symptoms are present
- Promote safety precautions in the event of positive test results and empower test users to take appropriate next steps for the health of themselves, their family, and the community
- Educate about the opportunity to participate in an optional research study in a way that does not detract from the primary messages of the public health initiative

### Target Audiences

The communications plan targets adult residents of the pre-selected communities, with a focus on underserved communities. The highest priority audiences are individuals with a greater exposure risk, such as essential workers and those who have many points of contact outside the home, along with their family members. While individuals who have been vaccinated for COVID-19, or who have previously had the virus and recovered, may participate, they are not a primary audience due to their lower risk of infection.

The at-home tests are authorized for use on individuals age 8 years and older, but the public information campaign will target their adult family members. In addition to reaching individuals in the community, the public information campaign will target community leaders and organizations who can help spread the campaign messages to their respective community members, encouraging participation in the public health initiative.

## Branding and Messaging

The Say Yes! COVID Test public health initiative is a collaborative effort between the NIH, CDC, Quidel (test manufacturer), CareEvolution (a healthcare technology company), community engagement partners from RADx-UP and Community-Campus Partnerships for Health, and research institutions including Duke and UNC. Our target audiences will receive direct communications from Say Yes! COVID Test collaborators in the form of test kits, an online digital assistance tool, text message reminders, and other print, digital, and media communications. Therefore, it is necessary for the public information campaign to maintain consistent branding and messaging across all communications, wherever possible.

### Branding

Say Yes! COVID Test is the overarching name and brand for the public health initiative. In addition, the name and logo will have the community name added to create a specific brand for each community. A community-specific brand is critical for our engagement with local audiences. See examples below:



Wherever possible, campaign messages and communications materials should include the community-specific Say Yes! COVID Test name and branding. The NIH and CDC names and branding will not be used on any campaign materials. With permission from the local health department, the local health department name and logo may be used on Say Yes! COVID Test materials. Use of the Quidel name or brand must be reviewed and approved by Quidel.

Refer to the Say Yes! COVID Test Branding Guide for more details on use of the program logos, brand colors, and fonts.

The research sub-study will be referred to as the Say Yes! COVID Test research study in public-facing materials.

## Key Messages

The ultimate goal of the public information campaign and testing initiative is to reduce community spread of COVID-19. By providing free, rapid at-home tests for COVID-19, we are putting power in the hands of individuals to be able to keep themselves, their family, and their community safe. Please refer to the Key Messages Document for the full list of key messages.

## Tone and Voice

The public information campaign's tone across channels should be:

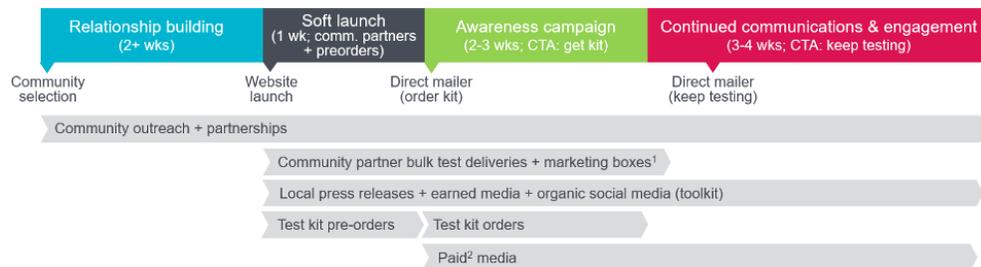
- Clear
- Personal
- Empowering
- Motivating

The public information campaign's voice is:

- Informative
- Action oriented
- Community focused and friendly
- Accessible
- Supportive
- Inclusive
- Concise

## Communication Channels, Timing, Frequency, & Evaluation

Please see the graphic below summarizing the key communication tools. A further explanation of key channels is outlined below the graphic.



CTA, call to action.

<sup>1</sup>Marketing box includes posters, flyers, buttons, cardboard cutout

<sup>2</sup>Paid media includes digital ads, radio & TV PSAs, billboards, mass transit ads, newspaper ads

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[RETURN TO: CREATING A COMMUNICATIONS PLAN, MESSAGES, AND MATERIALS](#)



Channel	Announcement to Local Press
Audience	Potential and current participants in the testing initiative and research study, community residents, community leaders, media
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Promote media coverage of the initiative to spread awareness and excitement throughout the local community</li> <li>• Demonstrate community leader support for the initiative through quotes</li> <li>• Establish trust through a connection with the local health department</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> </ul>
Timing/Frequency	Once around March 29 (program launch)
Measurement	Number of stories run on local media, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate), number of test kit orders



Channel	Say Yes! COVID Test Community Website
Audience	Potential and current participants in the testing initiative and research study, community residents, community leaders, media
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Serve as a central point of information for all testing initiative details</li> <li>• Facilitate test kit orders (through linkage to the CareEvolution site) or pick-up at local locations</li> <li>• Encourage community participation in the testing initiative and completion of the at-home testing challenge</li> <li>• Provide instructions on what to do with test results and link to CDC and local health resources</li> <li>• Introduce the optional research study opportunity</li> <li>• Provide lay summary results from the initiative once available</li> </ul>
Timing/Frequency	The website will be the first communication channel to launch for the campaign and will remain live throughout the campaign and for a period of time afterwards. Content will need to be updated throughout the course of the campaign to transition the focus from test ordering to continued testing use. After completion of the campaign, the website can remain live to share initiative results with the community.
Measurement	Website visits and other Google Analytics metrics (eg, time on site, bounce rate), number of people directed to the test kit order site

Channel	Initial Direct Mailer Postcard
Audience	All households in selected community
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Introduce the testing initiative</li> <li>• Provide a clear call to action</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> <li>• Introduce the optional research study</li> </ul>
Timing/Frequency	Once at start of campaign
Measurement	Number of postcards sent and delivered, Say Yes! COVID Test website visits and other Google Analytics metrics (e.g., time on site, bounce rate), number of people directed to the test kit order site



Channel	Packing Slip With Test Kit (Inside Amazon Box)
Audience	Participants who have ordered a test kit online
Community specific?	No
Spanish translation?	No
Purpose/Goal	<ul style="list-style-type: none"> <li>• Give clear, concise instructions on how to participate in the at-home testing challenge</li> <li>• Encourage visiting the Say Yes! COVID Test website for more information</li> <li>• Prompt use of the online digital assistant for testing support</li> </ul>
Timing/Frequency	Once with test kit
Measurement	Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate), number of people directed to the online digital assistant site





Channel	Instructional Postcard
Audience	Participants receiving a test kit
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Give clear, concise instructions on how to participate in the at-home testing challenge</li> <li>• Provide a source for more information about the testing challenge</li> <li>• Introduce the optional research study opportunity</li> </ul>
Timing/Frequency	Sent once via direct mail at the same time as kit order (sent separately) or handed out with test kit at pick-up site
Measurement	Postcards distributed, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)



Channel	Reminder Direct Mail Postcard
Audience	Participants who have ordered a test kit online
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Encourage continued use of testing kits according to campaign goals</li> <li>• Provide a source for more information should the participant have questions</li> </ul>
Timing/Frequency	Sent once via direct mail ~2 weeks after test kit order
Measurement	Postcards distributed, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)



Channel	<b>Social Media Toolkit</b>
<b>Audience</b>	Local public health departments, community leaders, and community partners (eg, schools, employers)
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	No
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Provide community leaders and partners with ready-to-use content, graphics, and videos to post on their existing social media channels</li> <li>• Raise awareness of the testing initiative and encourage participation</li> <li>• Drive traffic to the campaign website for more information and to sign up</li> <li>• Remind participants to continue the at-home testing challenge throughout the campaign</li> </ul>
<b>Timing/Frequency</b>	Distributed at the beginning of the campaign, with use encouraged throughout the campaign test kit at pick-up site
<b>Measurement</b>	Use of specific hashtag(s), number of posts and shares, social media–driven Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate), community feedback



Channel	<b>SMS Text Reminders</b>
<b>Audience</b>	Participants in the testing initiative who have signed up to receive text reminders
<b>Community specific?</b>	No
<b>Spanish translation?</b>	Yes
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Provide test kit delivery status updates</li> <li>• Remind participants to continue the at-home testing challenge throughout the campaign</li> <li>• Give accurate and concise information at appropriate times</li> </ul>
<b>Timing/Frequency</b>	From test kit order (SMS sign-up) through completion of the testing challenge
<b>Measurement</b>	Number of SMS sign-ups, number of SMS messages sent, number of opt-outs, community/user feedback

Channel	<b>Digital Ads (Banner Ads, Social Media Ads, and Other Paid Online Ads)</b>
<b>Audience</b>	Potential and current participants in the testing initiative and research study, community residents, community leaders
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	Yes
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest, such as through appealing copy, animated graphics, etc.</li> <li>• Provide a clear call to action</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> </ul>
<b>Timing/Frequency</b>	From beginning of campaign through duration of campaign
<b>Measurement</b>	Number of ad clicks, referral Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)



Channel	<b>Radio and TV Public Service Announcements</b>
<b>Audience</b>	Potential and current participants in the testing initiative and research study, community residents, community leaders
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	Yes
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest</li> <li>• Provide a clear call to action</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> <li>• Remind participants to continue the at-home testing challenge throughout the campaign</li> </ul>
<b>Timing/Frequency</b>	From beginning of campaign through duration of campaign
<b>Measurement</b>	Number of ads aired, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)



Channel	<b>Billboards and Mass Transit Ads (Buses, Bus Stops)</b>
<b>Audience</b>	Potential participants in the testing initiative and research study, community residents, community leaders
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	No
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest</li> <li>• Provide a clear call to action</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> </ul>
<b>Timing/Frequency</b>	From beginning of campaign through duration of campaign
<b>Measurement</b>	Number of ads posted, TBD



Channel	<b>Newspaper Ads (Print)</b>
<b>Audience</b>	Potential participants in the testing initiative and research study, community residents, community leaders
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	No
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest, such as through appealing copy, animated graphics, etc.</li> <li>• Provide a clear call to action</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> </ul>
<b>Timing/Frequency</b>	TBD
<b>Measurement</b>	Number of ads printed, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)





<b>Channel</b>	<b>Earned Media (Radio, TV, etc)</b>
<b>Audience</b>	Potential and current participants in the testing initiative and research study, community residents, community leaders
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	No
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Establish media partnerships to earn coverage that can promote the campaign to the local community</li> <li>• Train local community spokespeople on key campaign messages</li> <li>• Encourage visiting the website for more information and to sign up for the at-home testing challenge (order your test kits)</li> <li>• Remind participants to continue the at-home testing challenge throughout the campaign</li> </ul>
<b>Timing/Frequency</b>	Unknown
<b>Measurement</b>	Number of stories run, Say Yes! COVID Test website visits and other Google Analytics metrics (eg, time on site, bounce rate)



<b>Channel</b>	<b>Town Hall Slides</b>
<b>Audience</b>	Local public health departments, community leaders, and community partners (eg, schools, employers)
<b>Community specific?</b>	Yes
<b>Spanish translation?</b>	No
<b>Purpose/Goal</b>	<ul style="list-style-type: none"> <li>• Provide community leaders and partners with ready-to-use slides they can insert into presentations they are giving</li> <li>• Raise awareness of the testing initiative and encourage participation</li> <li>• Drive traffic to the campaign website for more information and to sign up</li> <li>• Remind participants to continue the at-home testing challenge throughout the campaign</li> </ul>
<b>Timing/Frequency</b>	Distributed at the beginning of the campaign, with use encouraged throughout the campaign. Also available for download from Say Yes! COVID Test website.
<b>Measurement</b>	Number of downloads from Say Yes! COVID Test website, community feedback

## Community Partner Toolkit in a Box

The following items will be included in a box shipped separately with each bulk test kit order to facilitate community partner distribution of test kits. These items are intended to help advertise the testing initiative at the test kit pick-up site.

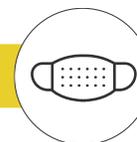
Channel	Posters
Audience	Potential participants in the testing initiative and research study, community residents
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest, such as through appealing copy</li> <li>• Provide a clear call to action to participate in the at-home testing challenge by ordering a test kit or picking up locally</li> <li>• Intended for use around high-traffic areas</li> </ul>
Timing/Frequency	Distributed with each bulk testing kit order; also available for download from the website for self-printing
Measurement	Number of posters distributed and downloaded



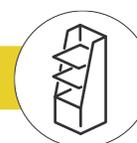
Channel	Flyers
Audience	Potential participants in the testing initiative and research study, community residents
Community specific?	Yes
Spanish translation?	Yes
Purpose/Goal	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest, such as through appealing copy</li> <li>• Provide a clear call to action to participate in the at-home testing challenge by ordering a test kit or picking up locally</li> <li>• Intended to be handed out individually</li> </ul>
Timing/Frequency	Distributed with each bulk testing kit order; also available for download from the website for self-printing
Measurement	Number of flyers distributed and downloaded



Channel	Face masks
Audience	Community leaders and distribution partners
Community specific?	Yes
Spanish translation?	No
Purpose/Goal	Intended for community leaders and distribution partners to wear as a sign of support for the campaign
Timing/Frequency	Distributed with each bulk testing kit order
Measurement	Number of face masks distributed



Channel	Cardboard Floor Stands
Audience	Potential participants in the testing initiative and research study, community residents
Community specific?	Yes
Spanish translation?	No
Purpose/Goal	Provide a clear call to action to participate in the at-home testing challenge by picking up a test kit
Timing/Frequency	Distributed with each bulk testing kit order
Measurement	Number of bulk test kits distributed



Channel	Tabletop Stands
Audience	Potential participants in the testing initiative and research study, community residents
Community specific?	Yes
Spanish translation?	No
Purpose/Goal	<ul style="list-style-type: none"> <li>• Introduce the testing initiative in a way that sparks interest, such as through appealing copy</li> <li>• Provide a clear call to action to participate in the at-home testing challenge by ordering a test kit or picking up locally</li> <li>• Intended for use around high-traffic areas (eg, grocery store checkouts, break rooms)</li> </ul>
Timing/Frequency	Distributed with each bulk testing kit order
Measurement	Number of stands distributed



RETURN TO:

**PUBLICIZING YOUR PROGRAMS AND EVENTS**

# Example Communications Toolkit

## You & Me COVID-Free Communications Toolkit

Thank you for your support of the You & Me COVID-Free program, which provides free, rapid, home COVID-19 test kits to people who need them most. Please help us spread the word throughout your community by sharing these messages.

This toolkit provides a variety of imagery and text ready for use by organizations and individuals. While these materials are designed to make sharing easy, please also feel free to customize or make your own!

### Flyer Templates

Add your distribution details (location, hours) to these flyer templates, and they'll be ready for you to print and use (printed size 8.5" x 11"):

<https://duke.box.com/s/zsd2y9a3ykr5zo01qshwmd8aszf6yju0>

### Poster Templates

Add your distribution details (location, hours) to these poster templates, and they'll be ready for you to print and use (printed size 11" x 17"):

<https://duke.app.box.com/file/885723196241?s=c2204rbgrqrw78o38g01fv0rr1t0bj0k>

### Graphics

See a variety of graphics you can use to promote You & Me COVID-Free. The images are sized for different social media channels:

<https://duke.box.com/s/1k6jit6is0y2r5f624pdbrcs5kspc0bo>

### Videos

Videos are an engaging way to reach community members. Check out several options for sharing: Coming soon!

RETURN TO:

**PUBLICIZING YOUR  
PROGRAMS AND EVENTS**

### **Email, Newsletter, or Bulletin Text**

Subject/Heading: Get your FREE home COVID test kits

Residents of Merced County can now pick up FREE, rapid, at-home COVID-19 test kits while supplies last. The tests are provided through a program called You & Me COVID-Free, a cooperative effort to help slow the spread of COVID-19, delivered by United Way, local community partners, and collaborators at Duke University and the University of North Carolina at Chapel Hill.

Protect your loved ones and our community by having confidence that you're infection-free before gathering for the holidays. You take the tests yourself at home, and results display privately in just minutes.

People who do not have symptoms can still spread COVID-19, so test to know before you go! To learn more and find a pickup site near you, visit <https://youandmecovidfree.org>

### **Facebook**

#### **Facebook Post 1 (Post Week 1-2)**

Have you heard? | Merced County residents can now pick up FREE, rapid, at-home COVID-19 test kits, while supplies last. Get your results privately at home in just minutes for peace of mind before the holidays. | Learn more & get yours <https://youandmecovidfree.org>

#### **Facebook Post 2 (Post Week 3-4)**

Have you gotten your FREE home COVID-19 test kits yet? Protect your loved ones and our community by having confidence that you're infection-free before holiday gatherings. People who do not have symptoms can still spread COVID-19, so test to know before you go! | Visit <https://youandmecovidfree.org>

#### **Facebook Post 3 (Post Week 5-6)**

So far, thousands of Merced County residents are taking part in You & Me COVID-Free. To prevent spreading the virus to those you care about, test to know whether you're infected before holiday gatherings. Get your FREE home test kits today <https://youandmecovidfree.org>

#### **Facebook Post 4 (Post Week 7-8)**

Merced County You & Me COVID-Free participants, keep using those home tests to know before you go and protect your loved ones! Please answer a few brief questions to help the program learn about your home testing experience: <https://youandmecovidfree.org/testing>

### Twitter and Instagram

These posts can be used on any social media platform you use most, though they are optimized for Twitter and Instagram. Share from your organizational or personal social media accounts.

**If you craft your own posts, consider using these hashtags:**

- #YouAndMeCOVIDFree      #COVID19      #COVIDTesting
- #coronavirus              #StaySafe      #KnowBeforeYouGo

### Weekly Suggested Posts

Week	Suggested Posts
<b>1</b>	<ul style="list-style-type: none"> <li>• Have you heard? Residents of Merced County can pick up FREE, rapid home #COVIDTesting kits for a limited time. Learn more &amp; get yours today   <a href="https://youandmecovidfree.org">https://youandmecovidfree.org</a> #YouAndMeCOVIDFree</li> <li>• Excited to be part of the #YouAndMeCOVIDFree program! Let’s do this, Merced County! Pick up your free home test kits while supplies last   Visit <a href="https://youandmecovidfree.org">https://youandmecovidfree.org</a></li> <li>• #YouAndMeCOVIDFree is here in Merced County with FREE #COVIDTesting kits to help you #KnowBeforeYouGo to any holiday gatherings. Get results at home in minutes   Pick up yours <a href="https://youandmecovidfree.org">https://youandmecovidfree.org</a></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• Today is the day! Visit <a href="https://youandmecovidfree.org">https://youandmecovidfree.org</a> NOW to find a pickup location for your free home #COVIDTesting kits. Don’t miss your chance to keep #YouAndMeCOVIDFree!</li> <li>• Hey, Merced County! Have you picked up your free #YouAndMeCOVIDFree #COVID19 home test kits? They can help you &amp; your loved ones #StaySafe for holiday gatherings.   Visit <a href="https://youandmecovidfree.org">https://youandmecovidfree.org</a></li> <li>• Test before turkey! Help you &amp; your loved ones #StaySafe from COVID-19 variants by grabbing your free #YouAndMeCOVIDFree home test kits   View pickup locations: <a href="https://youandmecovidfree.org/get-your-tests/">https://youandmecovidfree.org/get-your-tests/</a></li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Did you know? Even fully vaccinated people still have a chance of spreading the virus, so they should still test before holiday gatherings. Get your free home #COVIDTestKits for a limited time: <a href="https://youandmecovidfree.org/#YouAndMeCOVIDFree">https://youandmecovidfree.org/#YouAndMeCOVIDFree</a></li> <li>• Protect the people you love by having confidence that you’re COVID-free before the holidays. Get your free home test kits TODAY!   Visit <a href="https://youandmecovidfree.org/#YouAndMeCOVIDFree">https://youandmecovidfree.org/#YouAndMeCOVIDFree</a></li> <li>• For peace of mind that you won’t be giving your loved ones COVID for the holidays, use your #YouAndMeCOVIDFree home tests before gathering. Test even if you don’t have symptoms!   Get yours <a href="https://youandmecovidfree.org/">https://youandmecovidfree.org/</a></li> </ul>

- 4**
- Merced County residents, come get your FREE #YouAndMeCOVIDFree #COVID19 testing kits at [location] from [hours]
  - Do you have rapid COVID tests at home for when you need them? Don't be caught unprepared—get your free test kits from #YouAndMeCOVIDFree while you can! | View pickup locations <https://youandmecovidfree.org/get-your-tests/>
  - #YouAndMeCOVIDFree test kit recipients: take a brief survey to help the program understand your experience with home #COVIDtesting | <https://youandmecovidfree.org/testing>

- 5**
- Who else wants their #COVID19 test results in just minutes from the privacy of home? Get your FREE test kits and #KnowBeforeYouGo to any holiday gathering | <https://youandmecovidfree.org/>
  - When you're ready to get back to the people and activities you've missed, FREE home test kits are here to help you #StaySafe. Get yours while supplies last | <https://youandmecovidfree.org/> #YouAndMeCOVIDFree
  - Have a holiday gathering coming up? Do you know when to use your #YouAndMeCOVIDFree test kits? Visit <https://youandmecovidfree.org/about-the-tests/> to know when it's best to test

- 6**
- Getting vaccinated is the best defense against COVID-19. Combine with #COVIDTesting for even greater protection for your family & community. Get your free #YouAndMeCOVIDFree home test kits today | Visit <https://youandmecovidfree.org/>
  - Home #COVIDTesting before you gather protects those most precious to us: our loved ones and families. Get your free tests today <https://youandmecovidfree.org/>
  - Are you one of the thousands of Merced County residents who have snagged their free #COVIDTesting kits to make holiday gathering safer? Pick up yours! <https://youandmecovidfree.org/>

- 7**
- Know what your loved ones don't want for Christmas? COVID. Use your #YouAndMeCOVIDFree test kits before gatherings, large or small, even if you don't have symptoms | Get yours <https://youandmecovidfree.org/#KnowBeforeYouGo>
  - Merced County, keep using those #YouAndMeCOVIDFree test kits to know before you go and protect your loved ones! Please complete a quick survey to help the program learn about your home testing experience: <https://youandmecovidfree.org/testing>
  - Santa came early with your free home #COVID19 test kits! Keep #YouAndMeCOVIDFree this holiday season by picking up yours today <https://youandmecovidfree.org/>

- 8**
- #YouAndMeCOVIDFree is going strong in Merced County! Testing to ensure you are #COVIDFree before any gathering makes us a healthier community <https://youandmecovidfree.org/>
  - The tests are free. The peace of mind is priceless. Know you're COVID-free before visiting family & friends this holiday season. Get your free home test kits while you can <https://youandmecovidfree.org/> #YouAndMeCOVIDFree
  - Thank you for making the #YouAndMeCOVIDFree program a success in Merced County. Your efforts have helped protect the health of our community. Let's stay strong in 2022!

RETURN TO:

**PUBLICIZING YOUR PROGRAMS AND EVENTS**

# Example Site Procedures

## Before Coming to the Distribution Site

Monitor yourself for signs of possible infection, including a fever of 100.4°F or higher (measured twice a day), a cough, or difficulty breathing. If you have any of these symptoms, do not come to the testing site. Call your test site and report that you will be unable to assist that day.

## At the Distribution Site

**1. All staff and volunteers should be screened upon arrival for fever and symptoms consistent with COVID-19.**

Individual temperatures will be recorded on the sign-in sheet contained in the Appendix along with the presence/absence of symptoms. If a screened individual is ill, exhibiting symptoms of COVID-19, or has a temperature of 100.4°F or higher, have them keep their cloth face covering or face mask on and leave the distribution site immediately.

**2. All staff and volunteers working at distribution sites shall be required to:**

- Wear a face mask that covers both mouth and nose at all times.
- Practice social distancing by maintaining a 6-foot distance.
- Disinfect and clean workspaces and routinely clean and disinfect all areas such as worktables and any shared equipment.

**3. Checklist to Be Completed Before Distribution Begins**

- Help set up site and do site walkthrough
- Ensure signage is onsite
- Set up and test thermometer(s)
- Ensure test kits for participants will be and are onsite, along with informational cards and stickers for participants. You may wish to have some of the promotional flyers on site in case people would like to take a flyer to give to someone they know.

**Equipment required at distribution site includes the following:**

- Folding tables: 2 per site plus 4 folding chairs (not provided by program)
- Feather Flag (13.5 ft. high when assembled): 2 per site
- Selfie signs (21"x30"): 1 per site
- Hand sanitizer and cleaning supplies (not provided by program)

**VOLUNTEER/STAFF SIGN-IN SHEET**

DATE	NAME	TEMP. CHECK	SYMPTOMS* yes/no	CHECK-IN TIME	CHECK-OUT TIME

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**4. Sign-In**

- All staff/volunteers must sign in at arrival.
- All staff must fill out the sign-in sheet, have their temperature checked, and answer symptom questions before beginning work.
- We recommend that staff wear their branded You & Me COVID-Free facemask while distributing test kits. Each distribution site can receive up to 50 facemasks.

**\*SYMPTOM CHECK:**

Please answer the following COVID-19 survey before beginning work:

1. Have you been in close contact with anyone you know to have had COVID-19 within the last 14 days?
2. Have you experienced cough, shortness of breath or difficulty breathing, chills, repeated shaking with chills, muscle pain, headache, sore throat, or new loss of taste or smell?
3. Have you vomited or had diarrhea in the last 24 hours?
4. Have you had a subjective fever (feeling feverish) or a measured temperature of 100.4°F (38°C) or higher?

If you have answered NO to all of these questions, and you agree to comply with all instructions on masking, social distancing, and sanitation, then you are clear to begin work.

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**RETURN TO:**

**RUNNING PROGRAM SITES AND HOLDING EVENTS**

# Example Volunteer Survey

**Q1 What organization are you distributing kits for today?**

- United Way
- Church
- Other organization

**Q2 How many times do you intend to distribute COVID-19 kits today?**

**Q3 Select household ZIP code**

- ▼ Drop-down menu

**Q4 Select number of kits dispensed to this household**

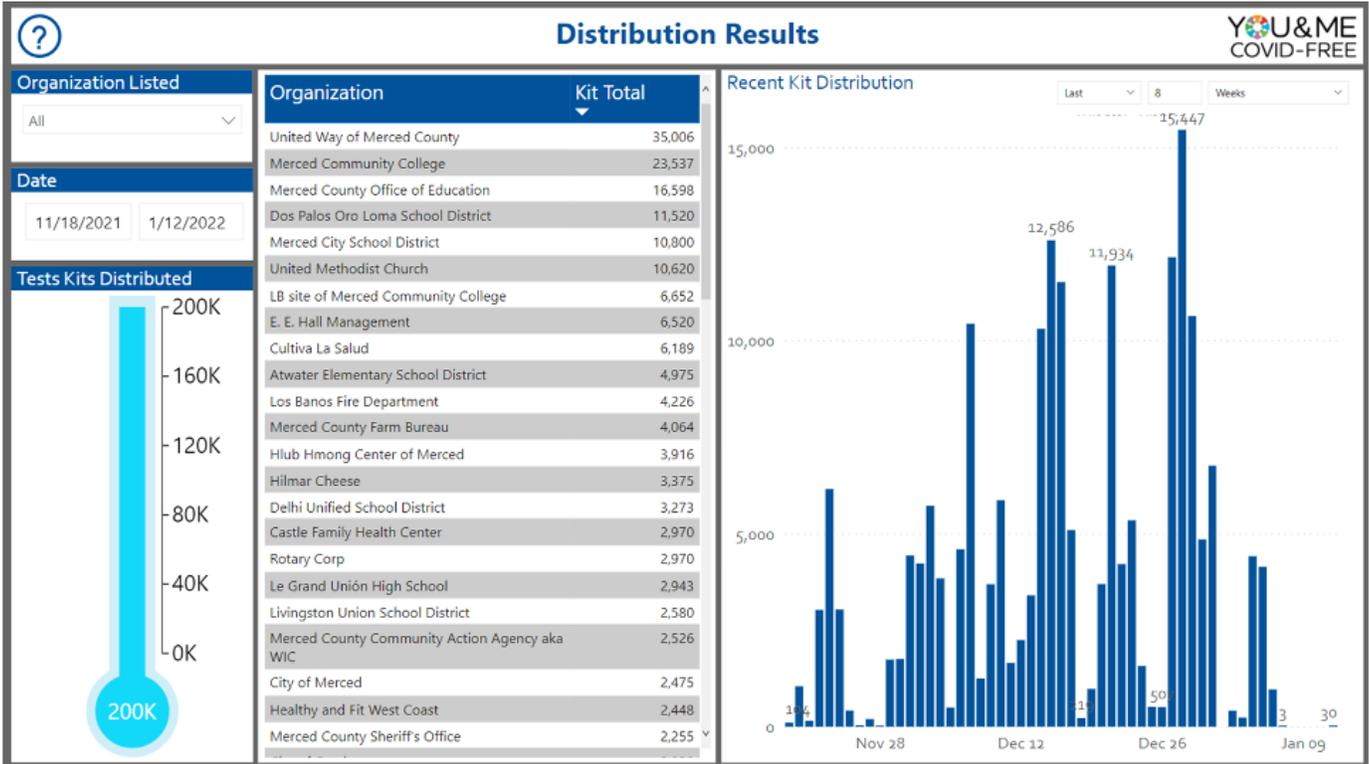
- 1 COVID-19 Test Kit
- 2 COVID-19 Test Kits
- 3 COVID-19 Test Kits
- 4 COVID-19 Test Kits
- 5 COVID-19 Test Kits

**Q5 Do you have any more kits to dispense today?**

- Yes
- No, end this session

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# Example Program Dashboard

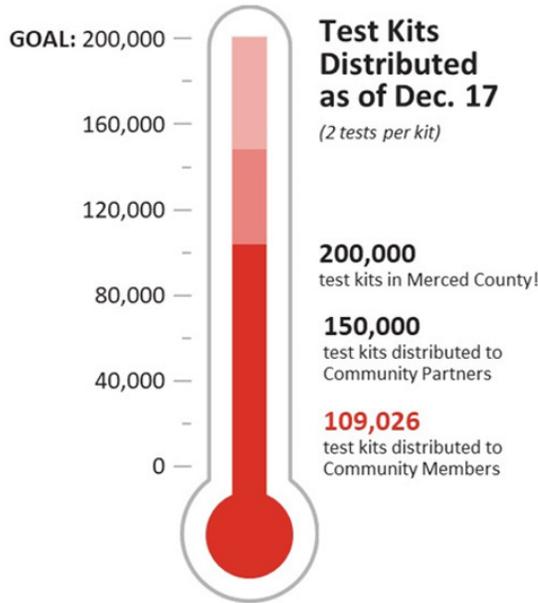


RETURN TO: [COLLECTING DATA AND TRACKING PROGRESS](#)

# Example Community Partner Newsletter

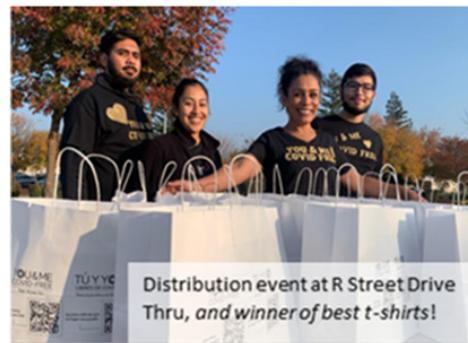
## Community Partner Newsletter – December 17, 2021

Thanks to your hard work and enthusiasm, as of today, Merced residents have received more than **109,000 test kits!** The last several days have been amazing, with more than **10,000 kits** distributed each day (see graph below).



### Top Distributors: Delivered >5,000 Kits:

Organization	Kit Total
Merced Community College	17,613
United Way of Merced County	16,870
Dos Palos Oro Loma School District	11,517
Merced County Office of Education	6,538
Merced City School District	6,208
United Methodist Church	5,293



### Message from Merced County



*"Honey, we need to leave in 15 minutes. I know but my throat is a little scratchy." That is something many have said, but went to the party anyway. "Let's do a COVID test—it only takes 10 minutes." "It's positive." Thank God we did, I wouldn't want to get mom and dad sick.*

*Thanks to Duke University and the United Way of Merced, this scenario can now be a common occurrence in Merced County. It is very important to keep our community safe and healthy, so know your COVID-19 status. It's not only easy, it's free. The You & Me COVID-Free tag line is, "Test, Know, Go". It's up to you!*

-Lloyd Pareira, Jr., Merced County Supervisor, District 4



### Distributor Notes

Encourage participants to take the surveys. The table below explains when participants can take the surveys and the incentive program.

Thank you for helping us track the number of free test kits given out by using the [Distribution Tracker](#) at all distribution events. **Please Remember:** To close a distribution session, for *What's Next*: select "No, done for the day".

All resources you need to hold distribution events can be found in our [Community Partner e-Toolkit](#).

Survey Description	Survey Activation	Gift Card
<b>Swab test survey</b>	Complete after each swab test ~1 minute to complete	<b>\$10 gift card</b> (enter lottery for 1 in 10 chance to win gift card)
<b>Study survey—Part 1</b> (detailed, baseline)	Complete after taking swab test survey and signing consent ~20 minutes to complete	<b>\$25 gift card</b> (will receive upon completion of survey; after the 28-day period for Part 2)
<b>Study survey—Part 2</b> (detailed, end of study)	Complete 28 days after Part 1 ~1 minute to complete	<b>\$25 gift card</b> (will receive upon completion of survey)

### Distribution by Event



### Message from Program Leadership



*The You & Me COVID-Free COVID test distribution has been going strong in Merced County. It is exciting to see that more than 140,000 tests have been distributed in the last three weeks.*

*Looking at the data from people taking the testing survey, the number one driver for people is to be sure they are COVID free before gathering with friends and family. That is so important. Another interesting result is that 80% of the people taking the survey were vaccinated. We do think that testing is very important for both unvaccinated and vaccinated people and stopping the spread of COVID-19 is something we all want to do.*

—Warren Kibbe, Chief Data Officer, Duke University School of Medicine

[YouAndMeCOVIDFree.org](https://YouAndMeCOVIDFree.org) | [TuYoLibresDeCOVID.org](https://TuYoLibresDeCOVID.org)  
[Facebook](#) | [Instagram](#)

RETURN TO: **GATHERING REAL-TIME FEEDBACK AND SHARING UP-TO-DATE INFORMATION**

# Example Debrief Session Questions

- Describe the pre-planning process from your perspective. What challenges did you face during the pre-planning stage? How did you develop your distribution plan? How did you choose community partners?
- What were the categories of partners you worked with in this project (faith, civic, education, non-profit, etc.)?
- Are there groups that you would have liked to work with or should have been partners? Why/ Why not?
- In reference to the logistics (getting the kits to the partners), what were the challenges? What, if anything, would you do differently?
- Regarding the community distribution process, scanning the kits and passing out the bag, was the process difficult? How could the process be improved?
- What were your best strategies for distributing the kits? Were there other strategies that you wished you had used?
- What feedback do you have on the methods of sharing in-hand distribution data through the DCRI metrics tool and dashboard?
- In reference to the project timeline for distributing the kits, what feedback can you provide?
- What value, if any, did the distribution truck and LED truck provide? In your opinion, did they serve their intended purposes?
- Did the weather or season of the year impact your ability to distribute kits?
- Were the best methods of communications utilized for the project (social media, TV, etc.)? If none, what method/type was missing?
- Are community partners and/or residents continuing to ask you about the project or ask for kits?
- If the project were to return to Merced, would you participate or encourage others to participate?
- In your opinion, do you think the project was an overall success?
- Overall, what worked well?
- What would you do differently?
- When challenges/issues arose during the project, can you describe the process used by DCRI and CCPH to assist you in resolving those challenges/issues? Provide details on the assistance provided by DCRI and CCPH towards the success of the project.
- Do you have plans for future collaborations with your community partners? If so, provide details. How likely is it that you would engage with your community partners based upon this project?
- How might DCRI and CCPH continue to assist your community throughout this crisis and beyond?
- Do you have any other comments that you would like to share?

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RETURN TO:

[ASSESSING METRICS AND RECORDING LESSONS LEARNED](#)

# Example Community Partner Feedback Survey

Thank you for participating in the You & Me COVID-Free program to distribute COVID-19 rapid at-home test kits to community members within Merced County, California.

As a Community Partner, your feedback is critical to our goal of delivering high-quality programming—we will use survey results to plan for future distribution programs.

Please take a few minutes to provide your feedback on this program.

**1. Please complete the following information:**

First & Last Name: \_\_\_\_\_

Email: \_\_\_\_\_

Organization [choose from drop-down list]: ▼

**2. For each distribution resource, please select whether it was useful, not useful, or not used.**

	Useful	Not Useful	Not Used
You & Me COVID-Free website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LED display truck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution truck (food truck)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feather flags	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face masks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution bags	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participant info card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media toolkit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**3. Of the aforementioned distribution resources, please provide comments on what worked well and what did not. If you used the distribution truck (food truck), we would especially like to understand feedback on the usefulness of this resource for future public health interventions:**

**4. Which of the following You & Me COVID-Free advertisements were you aware of that helped drive community members to your distribution event(s)?**

- Facebook ads
- Instagram ads
- Television commercials
- Radio commercials
- Newspaper ads
- LED truck
- Distribution truck (food truck)
- Direct contact (phone, e-mail)
- Word of mouth (friend, family, work)

**4.1 For each advertising method that you were aware of, please select whether the method was useful, not useful, or not used.**

	Useful	Not Useful	Not Used
Facebook ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instagram ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Television commercials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Radio commercials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Newspaper ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LED truck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution truck (food truck)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct contact (phone, e-mail)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Word of mouth (friend, family, work)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**5. Please provide any comments to improve our advertising methods for future public health interventions:**

**6. Please select your agreement: Within our organization, the distribution plan was effective.**

- Strongly agree
- Agree
- Somewhat agree
- Somewhat disagree
- Disagree
- Strongly disagree

**7. Please list up to three (3) steps within your distribution plan that were most successful in getting kits to community members:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**8. Please list up to three (3) steps within your distribution plan that you would change or eliminate in getting kits to community members:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**9. Please select your agreement: The Spanish version of the website was easy to find.**

- Strongly agree
- Agree
- Somewhat agree
- Somewhat disagree
- Disagree
- Strongly disagree

**10. Considering the number of Spanish speakers in the community, why do you think most participants navigated to the English version of the website over the Spanish version.**

- Community Partners primarily speak English
- Participants preferred to navigate in English
- English Website was promoted more
- I don't know
- Other, please specify: \_\_\_\_\_

**11. Please select your agreement: It was easy for community members to obtain COVID-19 test kits.**

- Strongly agree
- Agree
- Somewhat agree
- Somewhat disagree
- Disagree
- Strongly disagree

**12. Please select your agreement: Community members understood the program and why it is important to test for COVID-19.**

- Strongly agree
- Agree
- Somewhat agree
- Somewhat disagree
- Disagree
- Strongly disagree

**13. Please select your agreement: United Way of Merced provided excellent support to community partners during the distribution campaign.**

- Strongly agree
- Agree
- Somewhat agree
- Somewhat disagree
- Disagree
- Strongly disagree

**14. Please list the three (3) most beneficial aspects of the You and Me COVID-Free program for Merced County:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**15. Please list three (3) aspects that could be improved upon for the You & Me COVID-Free program for Merced County:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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RETURN TO: **ASSESSING METRICS AND RECORDING LESSONS LEARNED**