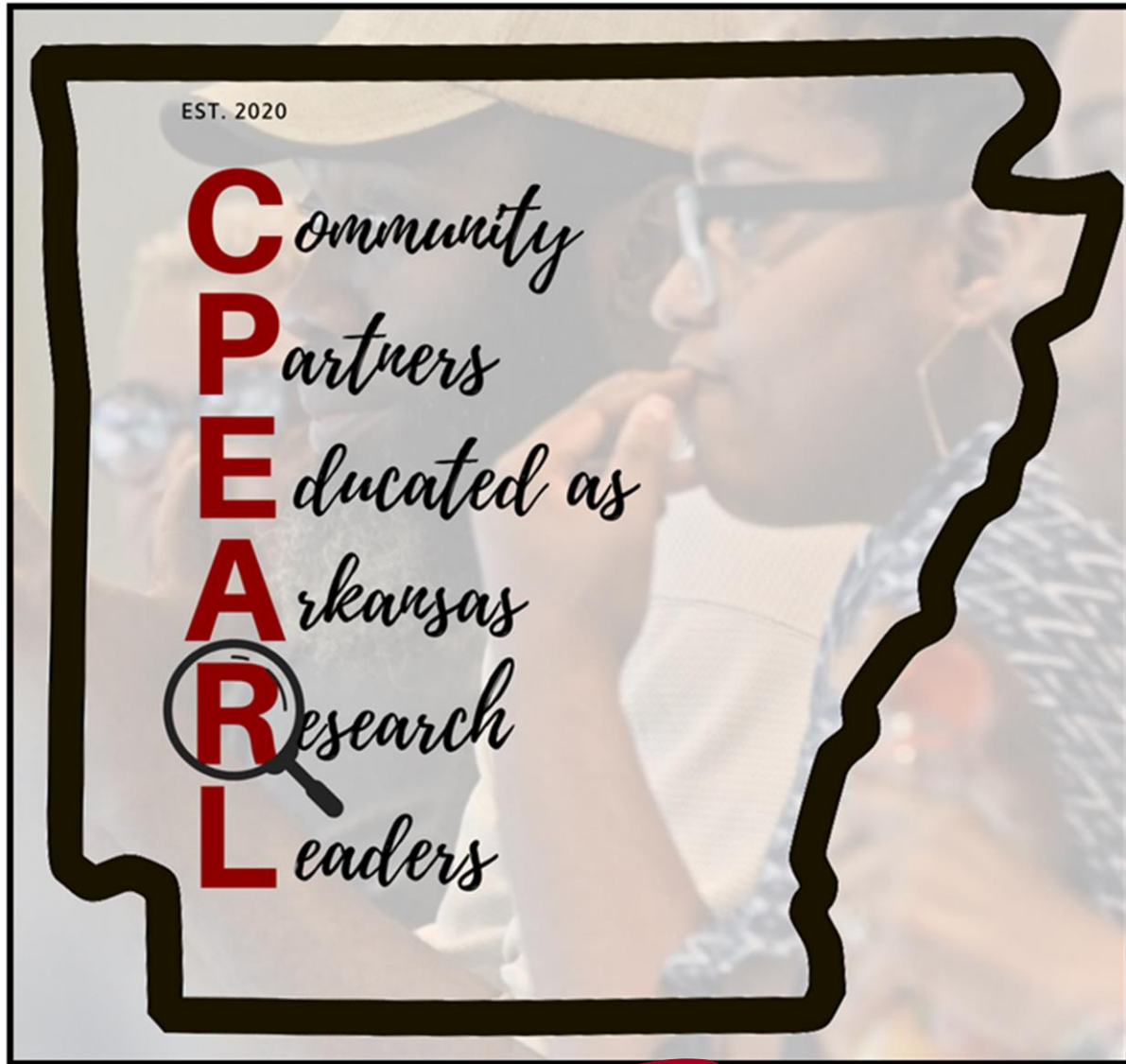




UAMS

Translational  
Research Institute



# Toolkit

*A Comprehensive Guide to Develop and Facilitate a Community Partners Educated as Research Leaders (CPEARL) Program at your Institution.*

Translational Research Institute Community Engagement Team  
UNIVERSITY OF ARKANSAS FOR MEDICAL SCIENCES | TRI.UAMS.EDU

# Community Partners Educated as Research Leaders (CPEARL) Toolkit

## *Table of Contents:*

1. Introduction
  2. Background
  3. Program Overview
  4. Start-Up Issues
    - 4.1. Gauge community interest
    - 4.2. 501c3 requirements for Community Based Organizations (CBOs)
    - 4.3. Dissemination of Projects
    - 4.4. Capacity of Staff
    - 4.5. Capacity of CBOs to commit staff to training
    - 4.6. Traditional Request for Application (RFA) vs Non-Traditional RFA
    - 4.7. In-person, online or hybrid option
    - 4.8. Determine length/dates/times of CPEARL
    - 4.9. Determine location
    - 4.10. Presenters –
  5. Budget
    - 5.1. Overall
    - 5.2. Seed grants
      - 5.2.1. Subcontracts
      - 5.2.2. Progress Reports
      - 5.2.3. Travel
  6. Program Format
  7. Curriculum & Session Structures
    - 7.1. Curriculum
    - 7.2. Orientation and Pre-Workshop
    - 7.3. Key Components to Weekly Sessions (2-5)
      - 7.3.1. Session Facilitator(s)
      - 7.3.2. Content/PowerPoint Presentation
      - 7.3.3. Participant Notebook
      - 7.3.4. Interactive Exercises
      - 7.3.5. Built in time for Networking/Mentoring Breakout Sessions
    - 7.4. Last Session of 6 Week Intensive
      - 7.4.1. Participant Project Proposal Presentations
      - 7.4.2. Celebration lunch and group photos
    - 7.5. 6 month Check-In
    - 7.6. Final Project Presentations
    - 7.7. Graduation
  8. Mentorship – Academic and Community Mentors
    - 8.1. Roles and Responsibilities
    - 8.2. Payments
  9. Marketing & Recruitment
    - 9.1. Advertising
-

- 9.2. Information Sessions
- 10. Application Process and Selection
  - 10.1. RFA
  - 10.2. Study Session (Academic and Community Reviewers)
- 11. Evaluation
  - 11.1. Pre/Post Knowledge Surveys (daily)
  - 11.2. Feedback Surveys
  - 11.3. Post-6 week Intensive Qualitative Interviews
- 12. Appendices
  - 12.1. Sample Program Planning Timeline
  - 12.2. Sample RFA
  - 12.3. Sample Memorandum of Understanding (MOU)
  - 12.4. Sample Study Session Review Template
  - 12.5. CPEARL Training Schedule
  - 12.6. PowerPoint Templates for 6 week intensive sessions
  - 12.7. Student Handbook
  - 12.8. Pre & Post Knowledge Surveys, Feedback Surveys
  - 12.9. PowerPoint Template for CPEARL Presentations
  - 12.10. Sample Acceptance and Rejection Letters

## 1. INTRODUCTION

The Community Partners Educated as Arkansas Research Leaders (CPEARL) program is a free, 9-month leadership development training program for non-profit community-based organizations (CBOs), beginning with a 6-week intensive. This program is offered by the University of Arkansas for Medical Sciences' (UAMS) Translational Research Institute (TRI) in partnership with the Arkansas Department of Health (ADH). The CPEARL program targets leaders and emerging leaders within CBOs located in Arkansas. This program aims to enhance research partnership and program development competencies within CBOs. Each of the CBOs selected received up to \$2,500 in seed funding to implement a real-world project. Teams of two to three individuals per selected CBO received an invitation to participate in the program. Academic, practice, and community experts provide interactive didactic learning sessions during the 6-week intensive. An assigned UAMS researcher mentors each team throughout the year. A community mentor provides one-on-one community consultations as needed.

The overall goal of the CPEARL program is to build the capacity of CBOs to address health disparities through improved programs, resources, and research partnerships. We adhered to the World Health Organization's definition of health: "Health is a state of complete physical, mental and social wellbeing and not merely the absence of disease or infirmity"<sup>1</sup> and define health disparities as "differences in health that are not only unnecessary and avoidable but, in addition, are considered unfair and unjust."<sup>2</sup>

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*"I think it is something that was long needed. The CPEARL provided me with some great information, great content, great knowledge. It was a lot but it was so good. It has helped me grow. It taught me how to write well, how to partner, how to speak well. It was a tremendous help. I don't know why they haven't done this before."*

*"It was one of the best investments I have made in my life. Going there and learning and coming up with a project was invaluable."*

*"We need knowledge, training and resources and CPEARL is the only program I have ever seen that does all three."*

*CPEARL 2020 Pilot Participants – Quotes from Qualitative Interviews*

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<sup>1</sup>Preamble to the Constitution of WHO as adopted by the International Health Conference, New York, 19 June - 22 July 1946; signed on 22 July 1946 by the representatives of 61 States (Official Records of WHO, no. 2, p. 100) and entered into force on 7 April 1948. The definition has not been amended since 1948.

<sup>2</sup>Whitehead M. 1990. The Concepts and Principles of Equity in Health. Copenhagen: WHO, Reg. Off. Eur. (EUR/ICP/RPD 414 7734r). 29 pp.

## 2. BACKGROUND

In 2019, The UAMS TRI Community Engagement (CE) Team learned of the University of Kentucky's CLIK program, which provided the foundation to jumpstart the program planning process.

The planning committee was comprised of the UAMS CE Program Directors and Staff.

The planning committee worked with the UAMS TRI Community Advisory Board (CAB) to review materials and refine content. The CAB unanimously gave their support for the CPEARL program, reviewed the Request for Applications (RFA), as well as a few members served as community grant reviewers during the grant review/study session. These conversations took place at quarterly CAB meetings and in-between with CAB subcommittees for the available CAB members. The CAB members received compensation for their time.

The CPEARL program partnered with the Arkansas Department of Health (ADH) to help with the following elements: identifying and confirming session speakers, grant reviewers, and being the fiscal distributor of the seed money throughout the program.

The CE team piloted the CPEARL program in Jan 2020 – September 2020. The pilot's 6 week intensive ended before the COVID-19 pandemic began in the United States. As you will notice in the toolkit, modifications were made to ensure the safety of the community and university.

We incorporated our successful Community Scientist Academy (CSA) to provide the participants with a 30,000 foot view of the research process, partnerships, research ethics, study design, grant funding, study implementation and dissemination, and how to get involved in research. As is custom in the CSA, we had multiple guest researchers to share their projects with the CPEARL participants and make connections for future potential projects.

## 3. PROGRAM OVERVIEW

CPEARL attempts to build research partnership readiness and capacity building in CBOs to help increase the opportunity for new and sustainable community-academic research partnerships. Upon completion of the program, the goal is for the CBO leaders/staff to have increased competencies in Community Engaged Research that allow them to access and leverage the funding needed to build capacity in their programs and organizations.

### Participant(s) Criteria:

- Applicants must be a 501c3 community-based organization in Arkansas.
- We encourage teams of 2 to 3 individuals from each CBO to apply together as a team.
- Team members may include CBO directors, emerging leaders, board members, administrators, and other key program staff.

**The long-term goal is to improve community capacity for partnered research to address health disparities in their respective communities.**

- This opportunity is most beneficial to organizations with moderate experience with program development and evaluation.

### **Program Requirements**

To accomplish the goals of the program, the full participation of each individual selected is necessary. To successfully complete the Institute, participants must:

- 1) Develop and implement a project to ensure that there is a “real world deliverable” that builds organizational and community capacity.
- 2) Attend all sessions. In order to achieve maximum benefit, each CBO’s entire team is expected to attend each session and attend the presentation of their project during the conference at the end of the program.
- 3) Provide a brief 6-month and 1-year progress report for the project.

### **Award Priorities**

The Translational Research Institute has a goal of reducing health disparities in Arkansas and a special focus on vulnerable populations underrepresented in research (i.e., racial or ethnic minorities, veterans, LGBT individuals, people with disabilities, and others that experience a disproportionate burden of poor health outcomes). **Projects focused on disparities might include but are not limited to efforts to address:**

- Higher rates of preventable illness and death due to cancer, chronic disease (e.g., diabetes, heart disease, hypertension, asthma, addiction, mental illness, HIV/AIDS, etc.), preventable injuries, and other conditions where disparities exist.
- Health behavior, policy, systems, environmental, and other risk factors associated with obesity, nutrition, physical activity, or tobacco/drug use.
- Barriers to health associated with rural residence, transportation, and geographic access to healthcare; lack of insurance and/or poor quality of care; and religious or cultural issues affecting health.
- Social determinants of health such as homelessness and housing issues, unemployment, access to quality education, incarceration, stigma and discrimination, psychological stress, violence, neighborhood gentrification, environmental justice, and residential segregation.

## **4. START-UP ISSUES TO CONSIDER**

### **4.1. Gauge community interest**

Prior to implementing CPEARL, it may be helpful to determine the level of community interest in attending the program. We suggest the following:

- Hosting Information Sessions
- Reaching out to existing local community partners, organizations, faith communities

- Utilizing your CTSA's Community Advisory Board to determine importance/need for type of program and disseminate program opportunity to their communities

#### **4.2. 501c3 requirements for CBOs**

For the CPEARL program, it would be ideal to have the discussion to determine if requiring CBOs in your area to be a 501c3 in order to apply.

This requirement was not easily made by the planning committee. The discussion was held and the pros and cons were tallied, in addition to push back from a few CAB members who believe this was too exclusionary. The committee looked at different options in order to recruit well-suited CBOs. These options included a maximum yearly operational budget. However, the requirement was incorporated into the pilot due to the following reasons:

- Institutional requirements to receive funding via the subcontract process
- Perceived capacity of the CBOs to participate in the program
- Future partnership requirements between CBO and academic communities

This decision was not unanimously supported though the majority of committee members voted in favor of this option.

#### **4.3. Dissemination of Projects via Conference/Graduation**

Dissemination of the CPEARL projects should be discussed during the early stages of program planning as this may involve either the development of a new conference, collaborating with an existing conference, and/or developing a dissemination plan to ensure the project results are relayed back to the community which may include videos, web-stories, pamphlets/booklets, etc. This aspect of the program also provided participants with experience making public conference presentations.

As previously noted, this program's foundational development was from the University of Kentucky's CLIK program. The CLIK program incorporates a conference specifically for their participants to disseminate their projects. Rather than add an additional conference to our area, we partnered with the UAMS' Community Campus Partnership Conference to Address Health Disparities for the CPEARL participants to provide presentations at their September 2020 Conference via afternoon breakout sessions. This conference moved to a virtual format due to the COVID pandemic.

Regarding program graduation, we were unable to host the in-person celebration, which was originally scheduled for the catered lunch session at the CCPC conference. We did mail their certifications and had previously held a catered lunch during their practice presentations on campus in March 2020.

#### **4.4. Capacity of Academic Staff**

Each CPEARL team/participant was assigned to an academic mentor. The mentors were assigned two CPEARL teams they met with weekly in-person during the 6-week training intensive. After the training, they provided additional mentorship either in-person or virtually, received and approved their mentee's 6-month progress notes for payment distribution, and attended the conference sessions.

During the pilot, we utilized existing CE team members as they were receiving salary support from TRI to cover the required time to mentor the teams. However, due to capacity issues for the second year, we are recruiting additional mentors and buying 5% of their time.

A program manager led the planning process via planning material development, keeping the committee on task in meetings, and developed the participant manual.

#### **4.5. Capacity of CBOs to commit staff to training**

Due to the size and capacity of the CBOs accepted into CPEARL, we realized the importance of having more than one person from each organization on the team. However, we did come across working with one organization that only had one full time member. Even with teams, we learned the organizations were taxed sending one person consistently through the 6 week intensive due to job duties. Some teams sent different people several times, which made it difficult to build on previous sessions, etc. We did ask for those attending the trainings to try to disseminate what they learned to those who were not in attendance. In addition, we did encounter a team member leaving the organization, who was point person, and this resulted in the combination of two other staff members joining the program mid-way through the intensive.

#### **4.6. Traditional vs Non-Traditional Request for Application (RFA)**

For the RFA, we chose a more traditional RFA, which asked the CBO to have a project outlined in their application along with a budget and other supporting documents.

However, based on feedback from participants, in the future we will have a non-traditional RFA, which will ask the CBOs to list their interests and organizational goals rather outlining a specific project. Pilot participants reported that the curriculum they received during the six-week intensive would have greatly aided their application process/project selection.



#### **4.7. In-person, online or hybrid option**

For the pilot, we had intended for the entirety of the program to be in-person on UAMS' Main Campus. However, the COVID pandemic arrived right after the six-week intensive and we transitioned to virtual meetings (check ins with their mentors) and an online conference where participants gave their final presentations. .

For the second year, we are changing the format to a hybrid option. More details available soon.

#### **4.8. Determine length/dates/time of CPEARL**

This will vary based upon the program's location and whether applications are accepted from across the state or some other region requiring long distance travel.

We decided to do a 6-week intensive to allow CPEARL participants to have plenty of time for project implementation for the remainder of the program.

This program is a significant time commitment, especially during the intensive. This should be emphasized in the RFA with a required letter from the CBO's executive director/board. Consider what will be the best time of day to schedule the weekly sessions to maximize consistent attendance by participants.

#### **4.9. Determine location**

When considering a location, you will need to consider the community's:

- Accessibility to the venue
- Access to reliable public transportation (if available)
- Parking availability and cost

From the institutional perspective, it might be that hosting the CPEARL on your campus is the most fiscally and reasonable option for logistics.

As previously mentioned, this may vary open if you open the application for statewide CBOs. You may want to consider rotating venues, adding optional online participant via remote sites, and/or transition the program to an online platform in its entirety.

**4.10. Presenters – Community Friendly**

Select presenters who know how to give lay friendly presentations and who can incorporate interactive activities into their sessions. If you want to standardize your program, provide presenters with a PowerPoint template and consider having the language edited internally to assure it is lay friendly and interactive. **Identify and assign the roles and responsibilities of the members of the training team.**

Having your community engagement team members involved in all aspects of the program will facilitate partnership development with your CTSA.

An example of CE team members’ roles/responsibilities:

- Recruitment of CBOs
- Registration and communication with participants
- Development of program materials (PPT slides/evaluation tool(s)/participant notebook)
- Coordination with the fiscal agent
- Setting up the room, ordering meals/refreshments
- Organizing classroom material
- Recruitment of session facilitators
- Logistics of daily sessions
- Data entry
- Lead on conference presentations and coordination with conference planner
- Identification and recruitment program mentors

**5. BUDGET**

**5.1. Overall**

The overall budget of the program will depend on how many CBOs are accepted into the program and a variety of other factors (location, online, amount of seed grants, outside presenters, per diem, etc.). Below is a breakdown of the items allocated for the pilot year. ***We will add the new budget once details are final for the second year.***

Items	6 CBOs	Comments
ADH Presenters/Grant Reviewers	\$3000	Subcontract w/ADH
Seed Grants	\$15000	\$2500 each
Hotels	\$5600	\$107 w/taxes and fee a night; for 7 nights

Mileage Reimbursement	\$8820	\$0.42 mile estimated at 400 miles (roundtrip) for 3 of the 6 CBOs
Venue	\$0	On Campus
Snacks	\$700	5 weeks
Meals x 8	\$3120	\$15 each to include meal, desert, drink and delivery for each session for estimated 26 people
Marketing/Promotions	\$100	Boosted FB Post
Printed Materials	\$300	Flyers, Binders for Participant Notebooks, Mentor Notebooks
Faculty Mentors	\$0	Covered in pilot year
Community Mentor	\$0	CE staff member: Community Liaison
<b>Estimated Total Cost:</b>		<b>\$36,640</b>

## 5.2. Seed grants

### 5.2.1. Subcontracts

Decide how funds will be disbursed. Below is an example of how this may be done in three installments.

- \$1,250 disbursed to each organization upon 6-week intensive completion
- \$625 disbursed to each organization at the 6-month check-in
- \$625 disbursed to each organization following the program presentation of their project

### 5.2.2. Progress reports

In order for CPEARL participants to receive funds they were required to produce a report documenting that they have met their objectives. A 1-page progress report, which the academic mentor completes and signs off on, will also suffice to assure that funds are successfully distributed on the preassigned dates.

### 5.2.3. Travel

In the application process, CBOs have the opportunity to apply for travel grants. This covers their mileage to the six-week intensive and any approved mentoring/project related meetings. Our institution utilizes ClinCards for this payment process.

**6. PROGRAM FORMAT** (see Appendix 12.5 for sample full program schedule)

<b>6 Week Intensive</b>	<b>Week 1</b>	Day 1: Orientation/Pre-Workshop Day 2: Community Scientist Academy
	<b>Weeks 2-5</b>	One Day a Week w/multiple content sessions
	<b>Week 6</b>	Project proposal presentations & celebration lunch
<b>Monthly Check Ins</b>	Based Upon Mentor And Mentee’s Availability	
<b>6 Month Check In*</b>	Mentor And Mentee Check In For Progress Report Completion	
<b>Conference Project Presentations**</b>	Virtual presentations during conference breakout track	

\*Modified Due To COVID-19 pandemic, originally Scheduled for 10 -2 For Updated Presentations

\*\*Modified Due To COVID-19 pandemic, originally Scheduled for in-person conference presentations

**7. CURRICULUM & SESSION STRUCTURE**

**7.1. Curriculum:** (See Appendix 12.6 for Modifiable PPTs for each topic & accompanying participant notebook sections)

**7.2. Orientation and Pre-Workshop**

- Pre-Knowledge Survey
- Welcome/Introductions
- Overview of CPEARL (Project Requirements, Resources, Logistics, and Schedule)
- How they will receive their mini-grants (procedures, schedule, etc.)
- Breakout Sessions with Mentors (Academic and Community)
- **Workshop – Health Disparities and Social Determinants of Health**
- Course Evaluation
- DAY 2: Community Scientist Academy

CPEARL Sessions
Health Disparities and Social Determinants of Health
1 Day Community Scientist Academy (More information/toolkit <a href="#">here</a> )
Assessing Community Needs/Assets Mapping
Research Partnership/Research Readiness Assessment
Finding, Using and Presenting Information from Public Data Sets to Support Your Mission
Quality Improvement/Evidence-Based Practice
Program Evaluation
Use of Statistics in Research
Promotional Materials Development
Effective Communication
Public Speaking
Designing and Implementing a Solid Budget
Grants

**7.3. Key Components to Weekly Sessions (2-5)**

**7.3.1. Session Facilitator:**

- Choose individuals who are able to use lay language and relevant experiences
- Utilize your partnerships with other institutions (Department of Health, VA) and community-based organizations to identify and invite individuals
- Provide a brief orientation (over the phone and/or email) to advise on their sessions being interactive rather than lecture; and the overall purpose of the program
  - In addition, provide a PPT template.

**7.3.2. Content/PowerPoint Presentation:** (See Appendix 12.6 for modifiable PPTs)

- Didactic content introduces basic information on session topic
- Video clips: Include lay friendly, short video clips embedded in the PPT presentation to clearly and simply define the content of each session.

**7.3.3. Participant Notebooks** (See Appendix 12.7 for participant notebook in Word)

- Provides participants an engaging and informative outline to help them focus on the content

**7.3.4. Interactive Exercises:**

- Participants are either split into their own organizational teams or paired off with another organization, depending on the exercise
- Goal: To allow participants to apply session content to their project
- Suggestion: Look to the 33 different Liberating structures to guide this process to allow for an alternative approach to learning.  
(<http://www.liberatingstructures.com/>)

#### **7.3.5. Built in time for Networking/Mentoring Breakout Sessions**

- Allocate time for mentoring/networking during the beginning of the day.
- Mentors and their assigned mentees can schedule time to meet either over lunch or directly after the end of the daily session based on their individual preference.

#### **7.3.6. Wrap up and Dismissal**

- Discussion of Housekeeping items and any remaining questions

### **7.4. Last Session of 6 Week Intensive**

#### **7.4.1. Participant project proposal presentation**

During the last weekly session, the participants provide 15-minute presentations that outline the following:

- Project Overview (Target Audience, Statement of Need, and Project Purpose)
- Project SMART Objectives
- Project Timeline
- Evaluation Plan

A PPT template is provided to the participants. (See Appendix 12.9)

#### **7.4.2. Celebration lunch and group photos**

Provide a catered lunch and celebrate the participants' accomplishments over the previous six weeks.

### **7.5. 6 month Check-In**

- Under normal circumstance, we recommend the participants provide an in person updated presentation (building on the one they had given at the end of the six-week intensive). During COVID, this transitioned to a virtual one-on-one meeting between the mentors and their mentees as many projects were on hold.

### **7.6. Final Project Presentations**

Participants presented at the now virtual conference, Community-Campus Partnership Conference to Address Health Disparities. Each CBO provided a 15-minute presentation during an afternoon breakout session, live streamed on YouTube.

## 7.7. Graduation

Under normal circumstances, we would hold a graduation ceremony for CPEARL participants in person, for example during the conference luncheon. However, due to the pandemic, we were only able to recognize them during the opening conference welcome and then we mailed their official program certificates.

## 8. MENTORSHIP – ACADEMIC AND COMMUNITY MENTORS

### 8.1. Roles and Responsibilities

Academic Mentors are to:

- Attend the CPEARL orientation
- Be available for mentoring in the morning/lunch/afternoon (based on mentor's preference) during the 6 week intensive training
- Contact their mentee(s) at least once a month
- Complete progress reports
- Help guide their mentee(s)'s project
- Connect their mentee(s) to other resources
- Identify need for community consultation
- Participate in project evaluation
- Assist their mentee in dissemination/preparation of their project presentation
- Identify potential researcher to match with their mentee for 2nd year Community-Based Participatory Research (CBPR) Scholar's Program

Community Mentor is to:

- Expected to attend orientation day and other assigned days within the 6 week intensive training
- Available for phone consultations

### 8.2. Paid vs Unpaid

For the pilot, the UAMS faculty and community mentors already had their time allocated for this program under the CTSA grant. However, moving forward

- Faculty mentors that are not covered under this grant will have 5% of their FTE (time) "bought" by TRI to serve as mentors.
- Community mentors are to be compensated \$25 per hour for up to 6 hours per month.

## 9. MARKETING AND RECRUITMENT

Ideally, someone from the marketing /communications division of your institution, department or organization would coordinate the promotional efforts of your CPEARL program. However, if this is not an option, you can still successfully advertise the CPEARL.

### 9.1. Advertisement

We advise that you begin advertising your CPEARL 3 - 4 months prior to the release of the RFA. Advertising efforts should be done simultaneously using as many diverse methods as possible. When advertising, consider your target audience and be intentional in your efforts to appeal to said audience. Consider using photographs and clipart that feature representations of your intended participants. Make honest efforts to have your advertising placed in areas where your target audience will most likely come into contact with your efforts.

#### Suggested placement for advertising efforts:

- Flyers – Have both hard and electronic copies of a flyer that you can distribute in areas and outlets where potential participants may encounter this information (including on social media).
- Email blasts – Send electronic copies of the flyer out by email to list servs housed or maintained by your institution or department. Share the information with partnering organizations and local community leaders.
- Social Media, when used correctly, can be a valuable tool. Be sure to use the social media that is used most often by members of your target audience. Consider paying the fee to have your Facebook post boosted.
- Community Partners – If you have established community partners within the target population, ask for their assistance in recruiting participants. Word of mouth is a common way that participants learn about the program.

#### SUGGESTED MEANS OF ADVERTISING:

- Flyers
- Social Media
- Flyers – paper and electronic versions
- Email blasts
- Community Partner List

### 9.2. Info Sessions

- Host information sessions online after the release of the RFA. The information sessions will allow for the CBOs to ask questions and for the CE staff to provide the following information
- We recommend having morning and afternoon sessions online to help accommodate different schedules. In addition, record the sessions and upload them to your social media sites and institution's website for viewers that were unable to attend.

## 10. APPLICATION PROCESS AND SELECTION

### 10.1. Request for Applications (RFA)



For the pilot, we released a traditional RFA requiring the CBOs to propose a project and all the details (estimated budget, etc.). (See Appendix 12.2)

As previously mentioned, for the second year we will be releasing a non-traditional RFA, which will only require the CBOs to submit project idea/interest areas. This will allow those accepted into the program, to use the content provided to develop a more robust and evidence-based project.

## **10.2. Study Session (Academic and Community Grant Reviewers)**

In our partnership with ADH, they provided a portion of the practice based grant reviewers. In addition, we asked UAMS faculty (preferably those with experience or an understanding of Community Engaged Research) to serve as grant reviewers.

We incorporated community grant reviewers (selected individuals from our TRI CAB) and provided \$25 per hour plus their attendance at the study section. Based on your budget, you may consider giving community members a cap on how many hours they are to review the applications.

After review by CE staff to ensure all applications were complete, each application was assigned two reviewers: 1) Academic/Practice Based Reviewer 2) Community Reviewer.

The reviewers had 3 weeks to review the application.

All reviewers submitted their reviews online prior to the study section. (See Appendix 12.4 for Review Template).

## **11. EVALUATION** (See Appendix 12.8 for sample surveys and qualitative interview questions)

### **11.1. Pre/Post Knowledge Surveys (daily)**

We recommend administering a pre and post knowledge survey daily to assess the effectiveness of the CPEARL program in improving knowledge about the topics presented. We have participants create a unique identifier to allow anonymous linkage of pre and post surveys. Both surveys are completed on paper and an institutional staff member enters their responses into REDCap.

### **11.2. Feedback Surveys**

Feedback surveys allow the participants to evaluate the session's facilitator as well as the overall environment (food, room, length, etc.) of the day. We distributed the feedback surveys twice daily – 1) After the morning session 2) After the afternoon session. As with the pre-/post survey

knowledge forms, the participants complete a paper copy and then the data are entered into REDCap.

However, since implementation of this program, we have found success at administering the pre/post knowledge and feedback surveys via email only.

### **11.3. Post-6 week Intensive Qualitative Interviews**

After the 6 week intensive, an independent evaluator from our institution conducted qualitative interviews with the individuals from each participating CBO.. We highly recommend having someone outside of your team administer these interviews. We found the feedback very beneficial in modifying the second year of CPEARL.

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CPEARL Toolkit  
by UAMS TRI Community Engagement Team

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