



# Elevating Community Voice Toolkit



# Welcome

Welcome to the Elevating Community Voice Toolkit, a resource designed specifically for CareQuest Institute Of Oral Health® grantees and partners. The aim of this toolkit is to help you effectively communicate and promote the meaningful work you are doing within your communities.

Whether you are looking to attract additional funding, inspire community participation, or share the outcomes of your work, this toolkit will help you reach those goals. We've included a range of templates, tips, and best practices that you can directly apply to your promotional efforts.

We invite you to explore this toolkit, adapting it to meet your individual projects' unique needs and challenges. With these resources at your disposal, we are confident that you will be better equipped to elevate your voice and make a lasting impact in the communities you serve.



# Elevating Community Voice Toolkit

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# Section 1: Understanding Your Impact

## Worksheet for Identifying Key Achievements

Recognizing and documenting your achievements is essential in demonstrating your work's value and impact. This worksheet will help you structure, identify, and summarize the significant accomplishments of your project.

Upon completing this worksheet, you will have a structured and detailed account of your project's achievements, which can be instrumental in reporting, communications, and future planning. This document is a testament to your hard work and a tool for continual growth.

**Project/Initiative Name:**

*Write the name of your project or initiative.*

**Description:**

*Briefly summarize the objectives of the project or initiative.*

**Start and End Date:**

*When did the project/initiative start? If it's completed, when did it end?*

**Primary Objectives:**

*List the primary goals of your project/initiative.*

**Key Milestones:**

*Identify significant milestones you and your team reached during the project/initiative, offering a clear timeline of progress.*

1.

2.

3.

**Quantitative Achievements:**

*Outline measurable outcomes. This could be numbers of individuals served, improvements to a system, or any metrics that provide concrete data on your achievements.*

1.

2.

3.

**Qualitative Achievements:**

*Share non-measurable outcomes, offering insights into the intangible impacts, like improved community sentiments, increased awareness, or enhanced partnerships.*

1.

2.

3.

**Feedback and Recognition:**

*Did your project/initiative receive any awards, accolades, or specific feedback from stakeholders, beneficiaries, or partners? List them here.*

1.

2.

3.

**Challenges Overcome:**

*Every project/initiative faces hurdles. Document significant challenges you encountered and how you addressed them, providing a realistic view of your journey.*

1.

2.

3.

**Visual Evidence (if any):**

*Do you have any photographs, infographics, or videos that highlight the project's achievements? Make a note of them and where they can be found.*

**Impact Summary:**

*Consolidate your findings and insights into a concise summary. This will be useful for quick presentations, discussions with stakeholders, or marketing materials.*

# How to Gather Success Stories and Testimonials

Success stories and testimonials offer a personal and powerful testament to the impact of your work. They bring a human touch to the numbers and milestones, showing tangible evidence of your project's positive changes. Here's a step-by-step guide to help you collect these valuable narratives:



## 1. Identify Potential Storytellers

- **Direct Beneficiaries:** Those directly benefiting from your initiative often have the most compelling stories to tell.
- **Stakeholders:** Collaborating organizations, community leaders, or local partners can offer a broader perspective on your project's impact.
- **Team Members:** Those who have worked closely on the project can provide behind-the-scenes insights and narratives on the challenges and successes.

## 2. Determine Your Approach

- **Surveys:** Use tools like Google Forms or SurveyMonkey, for example, to solicit feedback and stories. Ask open-ended questions to elicit detailed responses.
- **Personal Interviews:** Schedule face-to-face or virtual meetings for a deeper dive. This approach often yields richer, more nuanced stories.
- **Feedback Events:** Organize community feedback sessions where beneficiaries can share their experiences in a group setting.

## 3. Craft Thoughtful Questions

Your questions during interviews should be open-ended to capture detailed responses. Some examples:

- “Can you describe a moment when [Project/Initiative Name] made a significant difference in your life?”
- “How has our initiative changed how you approach [specific challenge or activity]?”
- “What would you want others to know about the impact of this project on your community or personal life?”

## 4. Ensure Ethical Collection

- **Permission:** Obtain permission from participants before recording or documenting stories. Use consent forms when necessary, especially if sharing publicly.
- **Respect:** Ensure participants feel comfortable and safe when sharing. Make it clear they can skip any questions or withdraw their testimonial at any time.

## 5. Document and Store

- **Centralized Repository:** Use cloud storage or a dedicated database to store gathered stories, making them easily accessible for future use.
- **Categorization:** Organize stories based on themes, demographics, or project phases so you can quickly locate relevant narratives for different communication needs.

## 6. Acknowledge and Appreciate

Always send a thank you note or message to those who shared their stories. Recognizing their contribution fosters goodwill and encourages more stories in the future.

*By methodically collecting success stories and testimonials, you build a treasure trove of firsthand narratives that showcase your project's real-world impact. Use these stories in grant applications, presentations, social media, and other communication avenues to bring your project's accomplishments to life.*



## Section 2: Storytelling

### Why Storytelling Matters

Stories are one of our most powerful and effective communication tools, helping to drive change in our local communities and on a national level. A compelling story, strategically told, can inspire change and drive action.

Storytelling is a unique way for people to develop a deeper understanding of the transformative work we do every day to move toward an oral health system that is accessible, equitable, and integrated. Stories can also promote our mission, vision, and values at CareQuest Institute.

We all know someone with a story to tell. We want to share personal stories to highlight the very real challenges millions of people face and the obstacles they have overcome to access necessary oral health care.

Spotlighting the experiences of real people across the country will help us accelerate oral health care transformation and create a system designed for everyone.



#### **Stories are the most powerful way to activate the human brain**

More areas of the brain “light up” when people process stories than when they are engaged in other forms of language processing, suggesting stories are how people truly connect with ideas and make broader sense of them.



#### **Stories motivate voluntary cooperation**

Hearing compelling stories releases chemicals in the human brain, like oxytocin, that are associated with a feeling of safety — a basic condition for collaboration to occur.



#### **Stories change minds**

The more “transportive” or absorbing a listener finds a story, the more likely he or she is to develop favorable attitudes about its main character.



#### **Storytelling boosts memory and recall**

When the brain detects emotionally charged events, it releases dopamine, which boosts memory and information processing ability.

# How to Craft Your Story

Here's a guide to crafting a compelling story for your cause:

## 1. Embrace Simplicity

Crafting a powerful narrative doesn't require big words or complex specifics. Focus instead on being clear and genuine.

### Tips:

- Minimize the use of adjectives and compound nouns — words composed of two or more individual nouns stuck together. It is best to simplify what you're trying to say.
- Use heartfelt language that resonates with your audience.
- Consider using local slang or phrases that foster connection.
- Prioritize Grade 5 English. Will a fifth grader be able to understand what you're trying to say? This will help ensure your story is accessible to a broad audience.

## 2. Evoke Empathy

The most memorable stories forge an emotional connection with the audience.

### Tips:

- Position your audience within the narrative, allowing them to see the world from your perspective.
- Identify what truly matters to them and relate the story to their problems and concerns.
- Draw parallels between your characters and the audience, bridging any gaps of understanding.

## 3. Fortify with Facts

While stories engage the heart, data speak to the mind. Supporting your story with trustworthy facts strengthens its credibility.

### Tips:

- Supplement emotive anecdotes with relevant statistics or findings.
- Highlight the broader relevance of your story, ensuring it's not perceived as an isolated incident.
- Utilize resources like the CareQuest Institute for Oral Health's resource center for comprehensive data.

## 4. Foster Relatability

Your story shouldn't just be a one-sided narrative; it should resonate with and reflect the perspectives and worries of your audience.

### Tips:

- Understand your audience's values, concerns, and aspirations.
- Encourage them to share their experiences, further enriching the narrative landscape.
- Remember, compelling storytelling isn't about positioning yourself as the hero but building bridges of understanding and solidarity.

## 5. Drive Action

Every story should lead to a meaningful path, showing the audience how to help or take an action.

### Tips:

- Conclude with a clear and compelling call to action, whether it is donating, volunteering, advocating, or fundraising.
- Ensure your audience knows the next steps and how they can be part of the solution.

## 6. Adapt to Your Audience

While the core of your story stays unchanged, its delivery should be adapted to connect with diverse audiences.

### Tips:

- Understand the values, preferences, and cultural nuances of your audience.
- Adjust your narrative style, tone, or emphasis based on whom you're addressing.

*Crafting a story is an art. With these guidelines, you're well equipped to convey your message in a heartfelt and actionable manner. Remember, through stories, we find common ground, inspire change, and drive collective action.*





## Section 3: Identifying Your Communication Channels

Understanding the landscape of available platforms is vital to effectively promoting your achievements and success stories. This section will provide an overview of the key platforms — social media, websites, and local news — highlighting their features, benefits, and best practices.

### Social Media

Social media platforms are digital channels that facilitate creating and sharing information, ideas, and other forms of expression. They offer two-way engagement, enabling organizations and individuals to connect directly with an audience.

#### Key Platforms:

- **Facebook:** Useful for reaching a broad audience and sharing stories, events, and visual content.
- **X, formerly known as Twitter:** Ideal for short updates, networking with partners, and joining global conversations through hashtags.
- **Instagram:** Visually driven, perfect for sharing photos and short videos of project activities and beneficiaries.
- **LinkedIn:** A professional platform for showcasing organizational achievements, partnerships, and thought leadership.

#### Best Practices:

- Engage regularly and authentically with your audience.
- Utilize platform-specific features (e.g., Stories on Instagram, Polls on the X platform).
- Monitor analytics to understand audience engagement and adjust strategies accordingly.

### Websites

A website is your digital home, providing a central hub for information, updates, and deeper insights into your projects.

#### Key Components:

- **Home Page:** Your website's front door; it should capture attention and guide visitors intuitively.
- **About Page:** Describes your organization's mission and values.

- **Projects/Initiatives Section:** Detailed insights into your projects, including achievements, success stories, and future plans.
- **Blog/News Section:** Regular updates, articles, and stories showcasing your ongoing work.

#### Best Practices:

- Ensure the website is mobile-responsive, as many users may access it via smartphones.
- Incorporate strong visuals (photos, infographics) to enhance narratives.

### Local News

Local news outlets, including newspapers, TV stations, and radio, are influential in many communities and can amplify your message to a broader audience.

#### Engagement Strategies:

- **Press Releases:** Regularly send well-crafted press releases highlighting major milestones, events, or stories.
- **Media Relationships:** Build and nurture relationships with local journalists and editors. Become their go-to source for stories in your domain.
- **Op-Eds and Articles:** Offer thought leadership pieces or firsthand accounts of your work to local publications.

#### Best Practices:

- Be readily available for interviews or clarifications when a story is covered.
- Craft compelling, newsworthy narratives. What makes your story stand out?
- Stay informed about local news trends and tailor your communications accordingly.



*Each platform offers unique advantages. By understanding these and tailoring your communications strategy to each platform's strengths, you can maximize your outreach and will effectively share the positive impact of your work.*



## Section 4: Utilizing Media

### How to Write a Press Release

#### 1. Format

- Avoid using PDFs — they may look neat and tidy, but it makes copying and pasting text much more difficult. The most pleasing format is a clean Word document. You can't go wrong with pasting the press release's content into the body of the email too — sometimes the attachment is faulty and it's best to have all your bases covered.
- Include contact details in case the media want to contact you for more information.
- There is no need to squeeze your organization's name into every line of every paragraph. Leave out adjectives like "best," "world's leading," and "most advanced" if you don't have the sources to back up those statements.
- Provide the correct links to research and resources that you've used to get to any conclusion.
- To minimize back-and-forth emails, check that you've included all the details in the release and that you've attached what's necessary. More specifically, include names and addresses, dates and times, social media handles, and the relevant hashtags.

- Proofread: take one final read-through and ensure you've included everything and removed "[Confirm X]" or similar placeholders. Do a spell-check for typos and get a colleague to read it. A second set of eyes will often catch errors you've missed.

#### 2. Pitching to the media

Once your press release has been written, checked, double-checked, and approved, you can pitch it to the media.

- A standout subject line is not, "BREAKING NEWS" in capitals, as journalists get hundreds of those. It's also not "Press Release," as that doesn't make anyone want to click. Use a standout feature or data point from your story to grab attention and make it easier for the publisher to follow up.
- Individualize your greeting, but don't go crazy — ideally, you want to find out the name of the person you're emailing. If you don't know the name, a simple "Hello," or "Good morning," will do. Avoid using gendered salutations such as "Dear Sir."

- Start with a sentence on why this news is important, to avoid having your mail sent to the “evergreen” inbox for a slow news day.
- Including a CTA is crucial: Ask the receiver if they’re interested in publishing the news or if there’s any more information they need that is not included in the release.
- Keep it short: This is the 100th email your receiver is opening today.
- Lastly, include your own details: name, company, email address and phone number.

## Tips for Being Interviewed:

Being interviewed by the media is an incredible opportunity to spotlight your work and share your message with a wider audience. However, it’s not just about what you say, but how you say it. You can create an engaging and impactful conversation with the right preparation and approach. Here are some guidelines to help you excel during your media interactions:

### Master Your Messaging

- Understand your goals and desired outcomes from the interview.
- Identify 2-3 core messages you wish to convey.
- Continuously practice delivering these points; ensure they’re impactful and resonate with your audience.

### Brevity Is Brilliance

- Short, concise answers hold attention better than lengthy ones.
- Aim to transition to additional topics after addressing your main points, keeping you in control of the interview’s flow.
- Avoid technical jargon and aim for clarity, ensuring your audience can easily connect with your message.

### Embrace Silence

- If you’ve made your point, don’t feel pressured to fill silent gaps.
- Refrain from offering unnecessary details to break the silence, which can lead to oversharing or veering off-topic.

## 3. Following up

Here are a few quick tips:

- Don’t follow up as soon as you’ve hit send. If you haven’t received a response within 24 hours, one follow-up call or email should be sufficient (unless it really is urgent, timely, or “breaking news”).
- Be careful about calling after office hours. Editors are likely juggling just as much trying to maintain a work-life balance as you are. Of course, emergencies can sometimes happen. If they do, highlight the exact part of the press release you need to be changed or omitted, and send it through as soon as possible.

### Hold the Reins

- Remember, it’s your narrative, and you can steer the conversation.
- Be prepared for probing questions; journalists aim to engage their audience with compelling content.

### Stay Composed

- Always remain calm and professional, even when faced with challenging questions.
- Interact with journalists with the mindset that you are always “on the record.”
- Repetition leads to perfection
- Thorough preparation reduces anxiety and increases effectiveness.
- Familiarize yourself with your core messages and practice their delivery until they flow naturally.

### Authenticity Is Key

- Your genuine enthusiasm and passion will shine through, creating a more memorable interview.
- Media interactions are opportunities to solidify your standing as an expert in your field.
- In conclusion, seize your media moment with confidence and clarity. With preparation and adherence to these guidelines, you’ll engage the reporter and deliver a standout interview that resonates with the audience.



# Tips for Writing and Submitting an Opinion Editorial

An opinion editorial (op-ed), historically positioned opposite the editorial page in newspapers, is an influential platform that captures its writer's insightful and well-informed opinions. Understanding how to craft an impactful op-ed is paramount as you navigate the media world. Here's a comprehensive guide to penning an effective op-ed:

## Core Traits of an Op-Ed

An op-ed is not just any piece of writing. It has distinguishing characteristics:

- **Length:** Typically spans 750–800 words.
- **Clarity:** Has a well-defined point and emanates clarity of thought.
- **Voice:** Reflects the robust and unique tone of the writer.

## Preliminary Questions for Op-Ed Crafting

Before diving into the writing process, consider:

- Do I have a compelling point to make?
- What's my core message?
- Who's my target audience? Why target them specifically?
- Is my argument substantive?
- What is my call to action?

## Deciphering Topic & Theme

The foundation of your op-ed lies in its topic and theme:

- **Topic:** This refers to the central subject of your op-ed, commonly addressed in the initial paragraph.
- **Theme:** The overarching idea underlying the topic, answering the “why” of your point. It delves into the deeper layers of your argument.

## Grounding Your Op-Ed in Research

Op-eds resonate when they're anchored in facts:

- **Field Research:** Direct, on-the-ground insights, observations, and interviews.
- **Secondary Research:** Leveraging academic resources, the internet, and publications. For instance, CareQuest Institute's resource library is a goldmine for oral health research.



## Crafting an Engaging Start and Finish

- **Opening:** A compelling start is pivotal. Use intriguing facts, metaphors, or claims that invite the reader to your argument's heart.
- **Conclusion:** Ensure a memorable ending. It should resonate with the introduction and either suggest or clearly state your conclusion. Consider both open (suggestive) and closed (declarative) endings, depending on your intent.

## Finding Your Voice

The soul of your op-ed lies in its voice:

- **Tone:** Op-eds are versatile, ranging from contemplative, and conversational, to humorous. The tone might be influenced by where you're publishing.
- **Fine-tuning:** Regularly reading your op-ed aloud aids in refining your voice, ensuring it aligns with your intended message and audience.

# Section 5: Social Media Strategy

## Social Media Dos and Don'ts

Navigating the ever-evolving landscape of social media can be challenging. To ensure effective communication and safeguard your organization's reputation, it's essential to understand the best practices and potential pitfalls. Here are some dos and don'ts to consider:



### Dos:

- 1. Engage Regularly:** Consistency is key. Regular posts keep your audience engaged and informed.
- 2. Use Visuals:** Incorporate high-quality images, graphics, or videos. Visual content is more likely to be shared and engaged with.
- 3. Interact with Followers:** Respond to comments, messages, and mentions. This fosters a sense of community and shows that your organization values feedback.
- 4. Tailor Content for Each Platform:** Understand each platform's unique characteristics and audience and craft your content accordingly.
- 5. Share Success Stories:** Human interest stories resonate well. Showcase the tangible impacts of your initiatives.
- 6. Use Hashtags Strategically:** They can increase the visibility of your posts. However, please don't overdo it; choose relevant and trending hashtags.
- 7. Monitor and Adapt:** Use analytics tools to track the performance of your posts and campaigns. Adjust your strategies based on what's working.
- 8. Stay Updated:** Social media platforms often roll out new features. Stay informed and consider how you might integrate these into your strategy.



### Don'ts:

- 1. Don't Over-Promote:** While it's essential to share achievements, avoid turning your feed into a constant stream of self-promotion.
- 2. Avoid Controversial Topics:** Avoid diving into polarizing or controversial debates unless it's directly related to your mission.
- 3. Don't Neglect Negative Feedback:** Address criticisms or complaints professionally and promptly. Ignoring them can escalate issues.
- 4. Avoid Generic Responses:** Automated or generic responses can appear insincere. Personalize your replies when interacting with followers.
- 5. Don't Share Unverified Information:** Always fact-check before posting. Sharing misinformation can damage your organization's credibility.
- 6. Avoid Overloading Posts with Hashtags:** Too many hashtags can make a post look cluttered and can come off as desperate for attention.
- 7. Don't Forget Privacy:** Avoid sharing sensitive or private information. Always obtain permission before posting pictures or stories of individuals.
- 8. Avoid Inconsistent Branding:** Ensure your branding, voice, and messaging are consistent across all platforms.

*Remember, social media is a dynamic space. While these guidelines provide a solid foundation, staying flexible and adapting to your audience's changing needs and preferences is helpful. By doing so, you'll maintain a positive and impactful presence online.*

# Section 6: Future Planning

## How to Sustain Your Promotional Efforts

Promotional efforts shouldn't be short-lived bursts of activity. Sustaining and evolving your promotional strategies over time is important for meaningful impact. Here's a guide to ensuring long-term success in your promotional endeavors:

### 1. Develop a Content Calendar

A content calendar helps plan and organize promotional content across various platforms.

#### Tips:

- Schedule regular posts to maintain consistency.
- Factor in special events, holidays, and observance days that align with your organization's mission.
- Review and adjust the calendar periodically to reflect changes or new opportunities.

### 2. Delegate Responsibilities

Spreading the workload ensures a continuous flow of content and ideas.

#### Tips:

- Assign content creation, posting, analytics tracking, and audience engagement roles.
- Conduct regular team check-ins to ensure everyone is aligned and to discuss challenges or new ideas.

### 3. Engage with Your Audience

Building and nurturing relationships with your audience can turn them into long-term supporters and advocates.

#### Tips:

- Promptly respond to comments and feedback.
- Encourage user-generated content, like sharing their stories or experiences with your initiatives.
- Organize interactive sessions like Q&As, webinars, or live chats.

### 4. Invest in Training

The promotional landscape, especially digital, evolves rapidly.

#### Tips:

- Provide team members with training on new tools, platforms, or best practices.
- Attend webinars, workshops, or conferences to stay updated on the latest trends.

### 5. Analyze and Adapt

Monitoring results will help you understand what's working and what isn't.

#### Tips:

- Use analytics tools to gauge the performance of your promotional activities.
- Regularly review and adjust your strategies based on insights gathered.

### 6. Diversify Your Channels

Don't put all your eggs in one basket. Diversifying ensures you reach different audience segments and aren't overly dependent on one platform.

#### Tips:

- Explore emerging platforms or channels that align with your target audience.
- Periodically review the relevance of the platforms you're currently using.

### 7. Celebrate Milestones

Recognizing and celebrating milestones, big or small, boosts morale and reminds your team and audience of your collective achievements.

#### Tips:

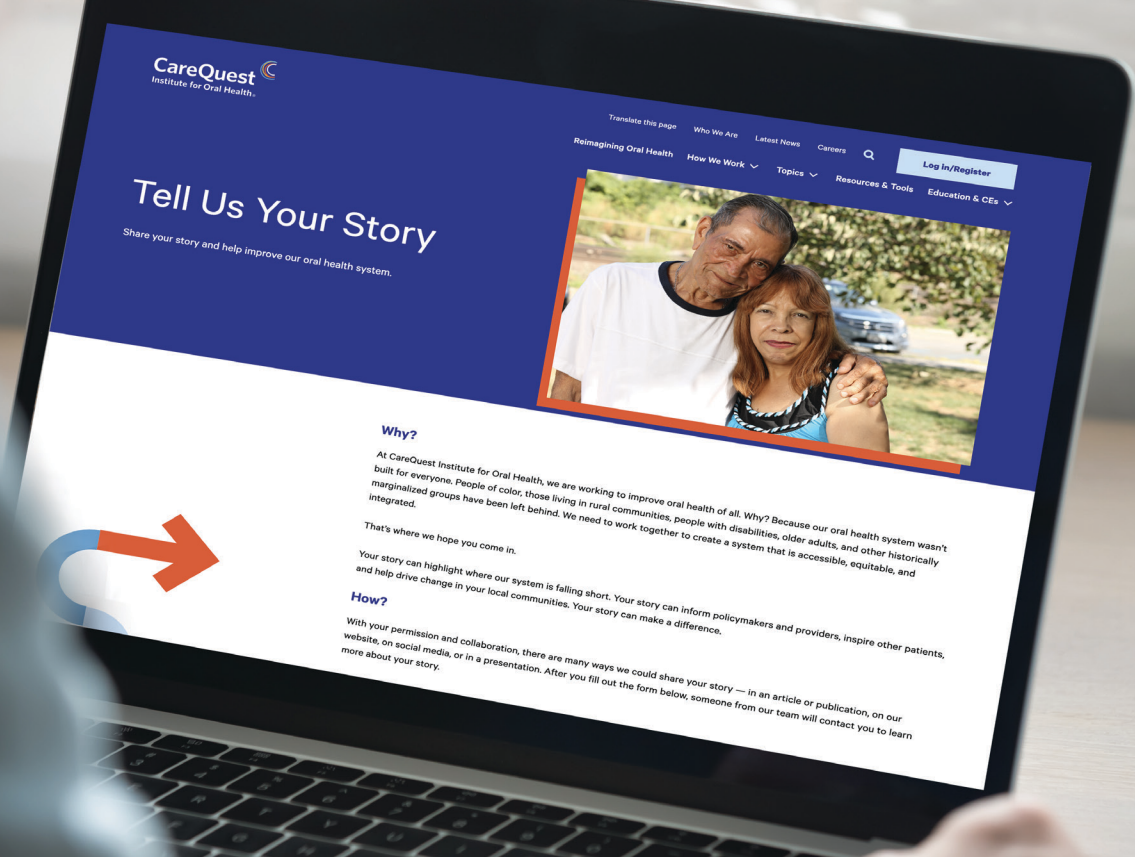
- Share stories of success, both internally and externally.
- Encourage team reflections on lessons learned and future aspirations.

### 8. Stay Passionate and Genuine

Authenticity resonates. Your genuine passion for your cause will naturally fuel your promotional efforts.

#### Tips:

- Periodically revisit your organization's mission and core values.
- Share behind-the-scenes glimpses, challenges faced, and the journey to underscore authenticity.



# Section 7: Sharing Your Story with CareQuest Institute

## Guidance on Submitting a Story to CareQuest Institute

At CareQuest Institute, we are working to improve oral health of all. Why? Because our oral health system wasn't built for everyone. People of color, those living in rural communities, people with disabilities, older adults, and other historically marginalized groups have been left behind. We need to work together to create a system that is accessible, equitable, and integrated.

That's where we hope you come in.

Your story can highlight where our system is falling short. Your story can inform policymakers and providers, inspire other patients, and help drive change in your local communities. Your story can make a difference.

### How?

With your permission and collaboration, we could share your story in many ways — in an article or publication, on our website, on social media, or in a presentation.



Please submit your story through our online story submission form. A team member will follow up with you to get more details.

**Visit [carequest.org/story-submission-form](https://carequest.org/story-submission-form)**



# The Stories We Hope to Tell

Examples of stories we'd like to identify:

- **Partners and grant recipients:** We want to highlight the work of our partners and grant recipients to create a more accessible, equitable, and integrated health care system for patients.
- **Medicaid/Medicare patients:** A patient with oral health coverage under Medicaid who identified a more significant health issue through their oral health visit. A senior or person with disabilities who struggles with poor oral health access through Medicare.
- **Veteran patients:** A veteran who has suffered from oral health issues because of the lack of comprehensive oral health coverage under the VA program.
- **Teledentistry patients/providers:** A patient and/or provider who can speak to the improved access to care teledentistry is offering. A rural patient would be an ideal example here.
- **Providers:** A provider working in a value-based care model coordinating with medical care teams, using MIC to improve patient experience and outcomes, and/or engaging in other transformative activities to improve the oral health of marginalized populations.

## What happens once I submit a potential story or story idea?

The communications team at CareQuest Institute will work together to get all the information we need to develop the story. We will provide follow-up communication throughout the process to update you on the story's status and how we plan to share it.

### Are the photos and videos I have usable?



Photos can be taken with a digital camera or camera phone. You do not need to have professional photos for a story.



Videos should be taken **horizontally, not vertically.**



Do a quick survey of the area around the subject, paying extra attention to the background. Is it cluttered? Is there any Private Health Info (PHI) on display?



How is the lighting? Can you clearly see the subject of the story? Feel free to send us the photos even if you think the lighting may not be great. We can try to edit the photos, if possible.



We will take both vertical and horizontal photos. We love options!

# Appendix

## Campaign Planning Template

This template is designed to be flexible. As each campaign will have its unique requirements and challenges, adapt and expand upon this framework as needed. Best of luck with your campaign!

### 1. Campaign Overview

- **Campaign Name:**  
*Provide a short, catchy name for easy reference.*
- **Objective:**  
*Clearly define the primary goal or purpose of this campaign, e.g., "Increase awareness about oral health among teenagers."*
- **Duration:**  
*Specify the start and end date of the campaign.*
- **Target Audience:**  
*Define who you're trying to reach, e.g., "Parents of children aged 5–12."*

### 2. Key Messages

- **Main Message:**  
*The core message you want to convey.*
- **Supporting Messages:**  
*Two or three additional messages that supplement and reinforce the main message.*

### 3. Tactics and Channels

- **Primary Tactic:**  
*For example, "Social media blitz on Instagram and Facebook."*
- **Supporting Tactics:**  
*List other methods you'll use to support the primary tactic, such as webinars, direct mail, etc.*
- **Materials Needed:**  
*List any materials you need to create or source, such as graphics, videos, articles, etc.*

### 4. Stakeholder Engagement

- **Key Stakeholders:**  
*List main groups or individuals whose support is crucial for the campaign's success.*
- **Engagement Strategy:**  
*Outline how you plan to involve or inform each stakeholder.*

### 5. Budget

- **Total Budget:**  
*Specify the overall amount allocated for this campaign.*

- **Breakdown:**

*Detail the estimated costs for each aspect of the campaign, e.g., advertising spend, event costs, content creation, etc.*

### 6. Promotion and Outreach

- **Media Channels:**  
*List the media outlets you plan to use, such as local newspapers, TV stations, radio, etc.*
- **Partnerships:**  
*Detail any organizations or individuals you'll collaborate with for a wider reach.*

### 7. Milestones and Timeline

- **Key Milestones:**  
*List the significant milestones of the campaign. E.g., "Launch date," "Mid-campaign review," "Closing event."*
- **Timeline:**  
*Provide a detailed week-by-week or month-by-month timeline of activities, ensuring each milestone is clearly marked.*

### 8. Measurement and Evaluation

- **Key Performance Indicators (KPIs):**  
*List the metrics you'll use to gauge the campaign's success, e.g., "Number of new followers," "Event attendance," "Website traffic."*
- **Evaluation Methods:**  
*Detail how you'll gather data and assess the campaign's effectiveness, such as surveys, analytics tools, feedback sessions, etc.*

### 9. Post-Campaign Review

- **Results:**  
*After the campaign ends, record the outcomes here.*
- **Learnings:**  
*Detail any insights gained, what worked, what didn't, and potential improvements for future campaigns.*
- **Testimonials/Feedback:**  
*Collect any positive testimonials or constructive feedback from stakeholders or the target audience.*

# Social Media Content Calendar

Month/Year: \_\_\_\_\_

## Goals for the Month:

List 2–3 main objectives you want to achieve with your social media content for this month.

Date	Day	Platform	Content Type	Post Description	Visuals	Link/CTA	Engagement Metrics
1/10/2023	Mon	Instagram	Image	Launch post for our new product	Product photo	“Check out the link in bio!”	Likes: XX, Comments: XX, Shares: XX
2/10/2023	Tue	The X platform	Poll	“Which feature do you like most?”	-	-	Votes: XX, Retweets: XX
3/10/2023	Wed	Facebook	Video	Behind the scenes at our office	1-min clip	“Visit our careers page!”	Views: XX, Comments: XX
...	...	...	...	...	...	...	...

## Notes:

- **Platform:** The social media platform where the content will be posted, e.g., Instagram, the X platform, Facebook, LinkedIn, TikTok, etc.
- **Content Type:** The content format, such as image, video, poll, carousel, GIF, story, etc.
- **Post Description:** A brief description or outline of what the post will entail.
- **Visuals:** Any graphics, videos, or other visuals accompanying the post. This could also include notations about where to find the visual asset or who is responsible for creating it.
- **Link/CTA:** Any call to action (CTA) you want to include, like “Shop now,” “Sign up,” or “Read more.” Also, note any specific URLs you’ll be sharing.
- **Engagement Metrics:** After posting, fill in this column with key engagement metrics, such as likes, shares, comments, views, etc. This helps in understanding the performance of each post.

## Additional Insights:

- **Most Successful Post:**  
*Once the month ends, reflect on which post got the most engagement and why.*
- **Areas of Improvement:**  
*Identify any content types or strategies that didn’t work well and consider how they can be optimized.*
- **Key Takeaways:**  
*Any other important observations, insights, or notes for future planning.*

Maintaining a social media content calendar helps streamline your posting schedule, ensures consistent engagement with your audience, and allows for a holistic view of your content strategy. Make sure to adjust and customize this template based on the unique requirements of your brand or organization.

## Free Press Release Template:

<https://www.meltwater.com/en/resources/press-release-template>



For additional resources or help,  
please contact:  
**[sward@carequest.org](mailto:sward@carequest.org)**

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## CareQuest Institute for Oral Health

CareQuest Institute for Oral Health® is a national nonprofit championing a more equitable future where every person can reach their full potential through excellent health. We do this through our work in philanthropy, analytics and data insights, health transformation, policy and advocacy, and education, as well as our leadership in dental benefits and innovation advancements. We collaborate with thought leaders, health care providers, patients, and local, state, and federal stakeholders to accelerate oral health care transformation and create a system designed for everyone. To learn more, visit [carequest.org](https://carequest.org).

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