

National Program Office Reporting Instructions

Bibliography Formatting and Submission



Robert Wood Johnson Foundation

SENDING GRANT PRODUCTS WITH AN ANNUAL OR FINAL BIBLIOGRAPHY

- Mark each grant product with the RWJF grant identification number.
- Send two copies of all materials created in the reporting period when you send your Annual or Final Bibliography. Each set of materials must be accompanied by a copy of the Bibliography.
- With the Final Bibliography or Summative Bibliography, do not send products already sent with an Annual Bibliography, if you have submitted one.
- Do not send any materials in binders.
- Do not write on CDs or DVDs; instead, put a label on the jewel case.

INSTRUCTIONS FOR SENDING SPECIFIC CATEGORIES OF GRANT PRODUCTS

- For **Books**, **Book Chapters**, published **Articles** and **Reports** (including fact sheets and issue briefs), send the published product.
- For unpublished **Articles**, **Books** and **Reports** (including fact sheets and issue briefs), submit the materials on disk or CD with a note “Not to be distributed.”
- For **Newsletters** produced as part of the program, send one copy of each issue of the newsletter. On a cover sheet, indicate the name of the organization producing the newsletter, number of issues produced each year and number of copies mailed per issue. This information is not to be included in the Bibliography.
- For **Survey Instruments**, send the finished instrument.
- For **Sponsored Conferences** and **Sponsored Workshops**, include all nonlogistical materials, such as agendas, speaker bios and audiotapes or videotapes. Do not send logistical materials. Do not send binders.
- For **Presentations** and **Testimony** by project staff, only send presentations made to national organizations where the presentation is available in a conference proceeding or has PowerPoint® or other formal materials. Send on a CD either the conference proceedings in which the presentation was published or the PowerPoint® or other formal materials with the date, name of the conference and conference sponsor on a cover sheet, and if the conference proceedings is available online, the URL of the report.
- For **Datatapes**, do not send tapes. Include information about the tape in the Bibliography, including the status of its preparation for Inter-university Consortium for Political and Social Research (ICPSR).
- For **Audiovisuals** and **Computer Software** produced under the grant, please mark the jewel case of each tape, disk or CD with the grant identification number and a two-line description of the contents, where it was produced, and where and when it was broadcast or presented.
- For **Web Sites** created by the program, print and send the home page and each section main page from the Web site. Date the first page at the top.
- For material about the program that appears on your Web site, print pages showing the material that was produced under the grant. Date the first page at the top.

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- For **Photographs**, place in an envelope and write on it the grant identification number, general subject matter, names of people in the photograph, place taken, location, photographer name and date taken. Include signed permissions from the subjects obtained by the photographer. *This information is not to be included in the Bibliography.*
- For **Posters** and **Artwork**, place in an envelope and write on it the grant identification number, general subject matter, artist's or creator's name and date created. If presented at a conference, include the name, date and location of the conference. *This information is not to be included in the Bibliography.*

INSTRUCTIONS FOR SENDING MEDIA COVERAGE PRODUCTS

Put the RWJF grant identification number on all cover sheets. *Information on media coverage is not to be included in the Bibliography.*

- For **News Conferences** and **Briefings** held on behalf of the work of the program, whether the event was produced by program staff or subcontracted, on a cover sheet, include the materials presented to the media, listing the date and place of the conference and how many people attended.
- For **Press Kits** and **News Releases**, include one copy of the materials sent to the media, when the material was sent and to how many organizations.
- For **Print Coverage**, create and send a cover page listing stories about the project appearing in national publications such as the *New York Times*, *Wall Street Journal*, *Washington Post*, *USA Today*, *Time*, *Newsweek* and *Business Week*; and in major regional/city newspapers (e.g., *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*). Include the title of the article, what newspaper or magazine it appeared in and the date. Attach the cover page to the clippings.
- For **Wire Service Coverage**, include one copy of the story and summarize its appearance in publications in a cover sheet.
- For **Book Reviews** of books published as part of the grant, send one copy of each review. If more than one review, attach a cover page listing the papers where the reviews appeared and dates of publication.
- For **Television Coverage** and **Radio Coverage**, send one tape or transcription of the coverage. Indicate the name of the show, topic or title of segment, station, place and date of airing. Include only coverage of one minute or more on national or network television shows; three minutes or more on national or network radio shows.

BIBLIOGRAPHY

BIBLIOGRAPHY OVERVIEW AND PURPOSE

If your grant has resulted in grant products in any of the bibliography categories listed on the next page, please include a Bibliography with your Annual Narrative Report, Final Narrative Report and Summative Report.

- The purpose of the Bibliography is to provide information about the funded program, not about the receipt of the grant or the organization receiving the funding.
- Your Bibliographies are separate documents from your Annual and Final Narrative Report, and your Summative Report.

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- An Annual Bibliography, if applicable, must be submitted to RWJF with your Annual Narrative Report for each TAD grant. The Bibliography should include all products produced by your program to date in the categories mentioned below.
- A Final Bibliography must be submitted to RWJF with your Final Narrative Report for each TAD grant. It should include all products produced during the TAD grant in the categories mentioned below.
- A Summative Bibliography must be submitted to RWJF with your Summative Report. The Summative Bibliography should be a record of all products produced over the life of the program in the categories listed below. *However, only send copies of products and media coverage that you have not sent previously.*

COVER PAGE

Create a Bibliography cover page with the date and appropriate header, for example, **ANNUAL BIBLIOGRAPHY: YEAR 1**, followed by the title of the program, the RWJF grant identification number and the dates covered by the Bibliography.

BIBLIOGRAPHY CATEGORIES

Bibliography entries are the following:

- Books
- Book Chapters
- Articles (including op-ed pieces)
- Reports (including evaluation reports, fact sheets and issue briefs)
- Audiovisuals and Computer Software
- Survey Instruments (only those created by the grantee for the program; do not include adapted surveys)
- Datatapes
- Web Sites
- Sponsored Conferences
- Sponsored Workshops
- Presentations and Testimony (at national meetings; only where a presentation appears in a published proceeding or is accompanied by a PowerPoint® document or other formal materials).

Some general guidelines for entries and formats:

- Use the italic headings that follow as bibliography entry headings.
- Use postal two-letter state abbreviations.
- Eliminate the uppercase “The” in the titles of newspapers and journals, as in *New York Times*, *Journal of the American Medical Association*, *New England Journal of Medicine*.

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ADDITIONAL GUIDELINES FOR PUBLICATIONS

- List publications alphabetically by author. When there are multiple listings for one author, put in publication date order, from oldest to most recent.
- Put published articles first. Then list those that have been accepted but not published (use the words *In press* after the name of the journal or the publisher).
- Finally, list those that are being submitted for publication or are listed as unpublished (use the word *Unpublished* after the name of the book, book chapter or article).

Books

Include books written or edited by program staff and produced as a result of the grant.

- Name of author(s) or editors(s). *Title of book*. Place of publication: Publisher, year of publication (or the words *In press*, if a commitment has been made by a publisher but the book has not yet been printed).

Example of a book:

Feinstein AR. *Multivariable Analysis: A Guide for Nonstatisticians*. New Haven: Yale University Press, 2001.

Example of a book accepted but not yet published:

Unintended Consequences. A collection of papers by former Health Policy Fellows. Washington: National Academy Press. In press.

Example of an unpublished book:

Community Health Leaders: A Collection of Heroes. Unpublished.

If a book with multiple authors is produced as part of the grant, first list the book as shown above, then list the chapter number, then the title of each chapter in quotes, followed by a comma and the author's first then last name. Use bullets, ending each bulleted item with a period.

Example of a book produced as part of a grant:

Altman SH, Reinhardt UE and Shields AE (eds). *The Future U.S. Health Care System: Who Will Care for the Poor and Uninsured?* Chicago: Health Administration Press, 2002.

- Chapter 1. "Health Care for Poor and Uninsured in the Future—Why It Won't Be Business as Usual," Stuart H. Altman, Uwe E. Reinhardt and Alexandra E. Shields.
- Chapter 2. "Uninsured in America: The Causes and Consequences," Diane Rowland, Judith Feder and Patricia Seliger Keenan.

Book Chapters

Include book chapters written by program staff that are published in a book that was not produced by the grant.

- Name of author(s) of chapter. "Title of chapter." In *Title of book* in which chapter appears, Editor name (ed). Place of publication: Publisher, year of publication (use *In press*, if manuscript is accepted but not yet published).

Example of a book chapter:

Ginzberg E. "Summing Up." In *The Regionalization of Personal Health Services*, Saward EW (ed). New York: Milbank Memorial Fund, 2002.

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Articles

Limit these to articles written by program staff for journals, magazines, webzines or editorial pages of newspapers. Do not include newsletter articles unless published in newsletters not issued by the grantee organization. Do not include works in progress. Do not include information about where an unpublished article has been submitted.

- Author(s) names. "Title of article." *Title of publication*, Volume number (issue): inclusive pages, year of publication. *Web site location to access article.*

Example of an article:

Adams LA, Mitchell E and Pierce HJ. "Health Policy and Access to Medical Care." *Journal of the American Medical Association*, 277(8): 215–233, 2001. Also appears at www.medjournal.org.

Example of article that has been accepted but not published:

Steigerwalt JM. "Use of Outpatient Mental Health Services by Adolescents in Pittsburgh." *American Journal of Public Health*. In press.

Example of article that has been written but not accepted for publication:

Sendroff SM. "Hard of Hearing Elderly Present Special Challenges for Adult Day Care." Unpublished.

Example of article published only on a Web site:

"Measuring the Quality of Care in Palliative Care Services: An Interview with Irene Higginson, Ph.D." In *Innovations in End-of-Life Care*, January/February 2000 issue, www2.edc.org/lastacts.

Reports

Include reports (e.g., evaluation reports, fact sheets and issue briefs) published by the national program office.

- Name of author(s) or editors(s). *Title of report*. Place of publication: Publisher, year of publication. *Web site location to access report.*

Example of an edited report:

Anders R, Gerbman F and Howe D (eds). *Quality Assurance in Health Care Today*. Washington: Brookings Institution, 2000. Also appears at www.brookings.org.

Example of a report without an author:

Primary Care in New York City. New York: United Hospital Fund, 2002.

For fact sheets and issue briefs produced as part of the program:

Title of fact sheet or issue brief. Organization publishing the fact sheet or issue brief, date issued.

Example of a fact sheet:

Children's Health in California, 2002. Children Now, June 2002.

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Audiovisuals and Computer Software

Include audiotapes, videotapes and computer software programs produced as part of the program.

- *Title of production*, brief description of the film, audiotape or computer software. Place of publication: Publisher, Date of publication or airing.

Example of an audiotape:

Hospital-Sponsored Group Practice: Ingredients for Success, a 150-minute audiotape. Chicago: American Hospital Association, 2001.

Example of a videotape:

Out of Order, four 30-minute videos on the health concerns of Generation X. Los Angeles: Rock the Vote. Aired on MTV, May 21–22, 2002.

Example of computer software:

Body Systems and Patient Care, Computer-Assisted Learning Lessons Project, an interactive computer program on CD-ROM. Northhampton, MA: Smith College, 2003.

Survey Instruments

These are surveys conducted as part of the program.

- “Title of survey,” Organization that fielded the survey, date fielded.

Example of a survey instrument:

“The Older Workers Survey,” Louis Harris and Associates, fielded May–August 2001.

Datatapes

Include datatapes produced as part of the program.

- “Name of datatape,” Organization conducting the research, dates of research on the tape. Status of its preparation for Inter-university Consortium for Political and Social Research (ICPSR).

Example of a datatape:

“National Survey of Chronically Ill Americans,” Louis Harris and Associates, March–June 2001. Sent to ICPSR April 2002.

Web Sites

Include *only* Web sites produced as part of the program or sections devoted to the program appearing as part of an existing grantee Web site. If a report, article or presentation produced by program staff appears on any Web site, it does not belong in this category; instead, list the entry in the appropriate preceding section.

- *Web address*. A brief description of the site. Place of origin: organization or individual whose site it is.

Example of a Web site:

www.medsch.wisc.edu/painpolicy/. Web site created to facilitate public access to information about pain relief and public policy. Madison, WI: Pain & Policy Studies Group of the University of Wisconsin Comprehensive Cancer Center.

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Sponsored Conferences

Limit these to only those conferences held as part of the program. List entries chronologically from oldest to most recent. Count but do not list details on keynotes, panels, concurrent panels or workshops. If one conference was presented in four places, list it once with the four dates. Include the availability of proceedings through a publisher and on the Web.

- “Title of conference,” Date, Place. Attended by how many people from how many organizations including examples of organizations attending. Number of presentations, number of plenary panels and number of workshops. Proceedings available at *Web location*.

Example of a sponsored conference:

“2002 National Media Education Conference, Media Education: A Paradigm for Public Health,” June 28–July 1, 2002, Colorado Springs, CO. Attended by 451 registrants representing 361 organizations from 31 states and six countries. Examples of organizations represented include the Centers for Disease Control and Prevention, the American Academy of Pediatrics and Rocky Mountain Public Broadcasting. Three keynote presentations, eight panels and 41 workshops. Proceedings available at www.nmec.org.

Sponsored Workshops

Include here interactive meetings held as stand-alone events as part of the program, or as sponsored workshops within conferences held by other organizations; workshops held as part of sponsored conferences are not included here. List entries chronologically from oldest to most recent.

- “Title of workshop,” Date, Place. Attended by how many people from how many organizations including examples of organizations attending.

Example of a sponsored workshop:

“Covering Children’s Television,” September 29, 2002, Washington. Attended by 16 newspaper and magazine critics, columnists, editors and network public relations executives.

Presentations and Testimony

These are presentations given by program staff at other organizations’ conferences, meetings or workshops, or testimony given at legislative hearings or to governmental agencies. List entries chronologically from oldest to most recent. Only include presentations made to national organizations where the presentation is available in a conference proceeding or has PowerPoint® or other formal materials. Indicate the availability of the proceeding, including the Web address if it is available online.

For testimony, include whether there was a written invitation, and if so, who issued the invitation.

For all presentations and testimony, place in chronological order from oldest to the most recent.

- Name of presenter(s), “Title of presentation,” at the Title of conference or meeting or name of governmental body testimony was made to, Name of the organization holding the conference or meeting, Date meeting held or testimony given, Place meeting held or testimony given. Title of Proceeding, available from Name of organization, or available online at www.nameofwebsite.org. For testimony, add name of requestor and date of request.

Example of a presentation:

Joan M. Teno, “Measuring Quality of Care for Persons Diagnosed with Life-Limiting Illness,” at the Annual Meeting of the Gerontology Society, June 9, 2002, Corvallis, OR. Proceedings of the meeting available at www.gerontology.org.

Example of testimony:

Gary Petersmeyer and Walter Wallaby, “The Facts on SSI’s Support of Disabled Children,” to the Senate Finance Committee, September 15, 2000, Washington. Written request from committee chair, Sen. Peter Piper, July 10, 2000.