

# Grantee Reporting Instructions

Overview



Robert Wood Johnson Foundation

## INTRODUCTION

We welcome you as a project director to the Robert Wood Johnson Foundation (RWJF) community of grantees. We suggest that you familiarize yourself with these requirements for reporting to RWJF. We hope they will provide you with helpful guidelines as you proceed with your project. Requirements for Annual Narrative Reports differ significantly from those for Final Narrative Reports.

If you have received a multiyear grant, we suggest that you review the Final Narrative Report questions at the start of your grant so you will be prepared to answer them when the grant ends. These instructions are part of this text, and also appear separately as Final Narrative Report Instructions.

If you are contemplating any changes in project scope or objectives, you should contact your program officer in advance to get approval in writing. Any changes that impact the budget may require a budget revision. (See *Grant Budget Revision Guidelines*.)

We want to hear from you if the project is succeeding, or if you find yourself facing unusual challenges at any time during your grant. Please alert your program officer and grants administrator about such concerns as soon as they become apparent, rather than waiting to tell us in your Annual Narrative Report.

For projects lasting more than one year, Annual Narrative Reports, together with financial reports are treated as confidential documents.

The Final Narrative Report takes the place of an Annual Narrative Report at the end of the final year of your grant. It is a substantive record of the activities conducted in all the years of your grant and how they met the goals set forth in your proposal.

The Bibliography is a separate document. It is submitted when you file your Final Narrative Report at the end of your grant. The Bibliography provides a record of publicly available products produced during the life of your project. (See *Bibliography Formatting and Submission*.)

E-mail your narrative reports and your grant products (as soon as they are available) to [grantreports@rwjf.org](mailto:grantreports@rwjf.org). Please review *RWJF Electronic Submission Standards* for complete electronic reporting instructions. Do NOT include correspondence in these e-mails as you will not receive a reply.

If you are a grantee within a national program with a national program office, also e-mail your reports and products to your contact at the national program office.

Once your grant has closed, at RWJF's discretion, material from your Annual Narrative Reports, your Final Narrative Report and your Bibliography may be used in a Grant Results report on your project. These reports are prepared by the Grant Results Reporting Unit (GRRU) in RWJF's Communications Office. They appear on RWJF's Web site at [www.rwjf.org/pr/grr.jsp](http://www.rwjf.org/pr/grr.jsp) and information in them may appear in other RWJF publications. Such reports are reviewed by grantees in advance to ensure that they are accurate and that RWJF's release of research findings does not interfere with their publication in peer-reviewed journals. These communications efforts are part of our commitment to be accountable for the use of tax-exempt funds, to publish information and lessons derived from our grants, to respond to inquiries, and for other public information purposes. Material in your Annual Narrative Reports and Final Narrative Report may thus assist those who can benefit from a record of your experiences and what you have learned.

RWJF also has an ongoing interest in the effects and accomplishments of your project over the long run and welcomes updates on the continuation, dissemination or replication of your work after your grant is closed. Please send any such news to [grantreports@rwjf.org](mailto:grantreports@rwjf.org) with a copy to [GRRU-admin@rwjf.org](mailto:GRRU-admin@rwjf.org) so any posted Grant Results report on the project can be updated. The news will be retained in our record of the grant and forwarded to your program officer. For questions please contact your grants administrator.

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*Annual Narrative Report*



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## **ANNUAL NARRATIVE REPORT—OVERVIEW AND PURPOSE**

We have devised a simple set of five questions for the Annual Narrative Report.

- Questions 1–4 ask you to tell RWJF about how your project is meeting its established goals, activities you have engaged in to date to meet those goals and any that have not been completed on schedule, and other issues you are addressing. We expect you to report to us any changes from the planned activities that were described in your proposal. Upon reading your answers to these questions, your program officer may contact you for additional information.
- Question 5—asks you to submit grant products electronically to RWJF at [grantreports@rwjf.org](mailto:grantreports@rwjf.org) as soon as they are complete. See *RWJF Electronic Submission Standards*. We only want your Bibliography with your Final Narrative Report. See *Grantee Reporting Instructions: Bibliography Formatting and Submission*.

## **FORMAT**

- The maximum length of an Annual Narrative Report is two pages, with a preferred length of one page.
- Use a 12-point font, one-inch margins and single-line spacing.
- Incorporate the first four questions as bold italic subheads.
- Do not include appendixes, attachments or exhibits in your report except as noted below.

## **COVER PAGE**

- Do not send a cover letter.
- Prepare the cover page of your report on an electronic version of your institution's or organization's letterhead.
- Include address, telephone number and e-mail address, if these are not included on your letterhead.
- If you do not have an electronic version, enter your organization's name, address, phone, fax and e-mail in the top left-hand corner of the cover page.
- Date the page.
- Head it **ANNUAL NARRATIVE REPORT** (Year 1, 2, 3, etc.), followed by:
  - the title of the project;
  - for projects within national programs, the name of the program;
  - the five-digit RWJF grant ID#;
  - the dates covered in the report;
  - the total amount of the grant; and
  - the goal of the project as described in the proposal.

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## **SUBMITTING ANNUAL REPORTS**

Upon notification from RWJF, please submit the report to [grantreports@rwjf.org](mailto:grantreports@rwjf.org).

- Put the ID# of your grant and the word *Report* in the subject matter field.
- Attach an electronic copy of the Annual Narrative Report to the e-mail.
- Name your Annual Narrative Report according to the report naming conventions in *RWJF Electronic Submissions Standards*.

Your grants administrator will be notified that your report has arrived and will distribute it within RWJF. Based on the information you provide, your program officer may contact you to ask for clarification or additional information during the course of your grant.

If you are a grantee within a national program with a national program office, also submit one electronic copy of your Annual Narrative Report to the national program office.

## **ANNUAL NARRATIVE REPORT—QUESTIONS**

**1. What did you accomplish during this reporting period? How did these accomplishments help you reach the goal of your project? If relevant, what indicators or benchmarks were used to determine your progress?** Briefly describe the activities carried out this reporting period to meet these goals, as described in your proposal.

- For a service project, indicate the number of people served during the year and being served currently, and the services that are provided, where and how. If the service project is only in the planning or development stage, indicate what has been accomplished to date.
- For a project making individual awards for training, leadership development or recognition, indicate the kinds of awards provided during this year and the results of the awards, including any special accomplishments during the year.
- For a project that aims to create institutional change, indicate the various activities and methods that have been undertaken to date to effect such change, and describe any changes that have occurred.
- For a communications project, describe the products produced or in production, how they are being or will be disseminated, the numbers distributed (if applicable), the size of the audience reached (if applicable) and the response (reviews, media coverage, etc.).
- For an evaluation project, describe the milestones to date in gathering and analyzing information, and preliminary findings to date from the evaluation.
- For a research project, describe the stage the project has reached in the research process and what has been accomplished during the year, including any preliminary findings.

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2. **What, if any, proposed activities were not completed?** Briefly describe those activities, the reasons they were not completed and your plans for carrying them out.
  - If the activities completed differ from your proposal, what caused these changes?
  - Were activities delayed and if so, why?
  - Will these activities be completed? When and how?
  - Are there any activities you will not be able to complete during the course of your grant?
  
3. **Has your organization received funding from other foundations, corporations or government bodies for the project RWJF is supporting?**
  - If so, please give each funder's name, the amount provided and when it was provided.
  - If the support is in-kind and you can estimate the dollar amount, provide that figure; if it is in-kind and you cannot estimate the amount, do not include it here.
  - Did RWJF funding help leverage this other funding or was it unrelated?
  
4. **Is there anything else you want to tell RWJF?** Please include an addendum to the report. Feel free to tell us about any other unexpected issues, concerns or successes you have had during this reporting period.
  
5. **What was produced during the reporting period?** Please describe the main products produced in this year. We ask that you submit these products to [grantreports@rwjf.org](mailto:grantreports@rwjf.org) as soon as they are completed. See *RWJF Electronic Submission Standards* for full instructions.

# Grantee Reporting Instructions

*Final Narrative Report*



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## **FINAL NARRATIVE REPORT—OVERVIEW AND PURPOSE**

- The Final Narrative Report is filed at the end of your grant before it can close. If you have had a multiyear grant, it replaces the Annual Narrative Report for the last year. Include all the activities and accomplishments of the entire grant—including the final year—in your Final Narrative Report.
- The Final Narrative Report asks seven questions that are designed to elicit essential information about the results, findings and lessons from your project, and how well it met its stated goals or objectives.
- Support your answers with quantitative data, where they are available and appropriate; provide other supportive evidence where requested.
- Use *None* and *Not applicable* where appropriate.

## **FORMAT**

- The maximum length of a Final Narrative Report is 10 pages, including any charts and tables. The preferred length is five to seven pages.
- Use a 12-point font, one-inch margins and single-line spacing.
- Incorporate the seven questions as bold italic subheads.
- Do not include appendixes, attachments or exhibits in your report.
- The Bibliography is a separate report.

## **COVER PAGE**

- Do not send a cover letter.
- Prepare the cover page of the report on an electronic version of your institution's or organization's letterhead.
- Include address, telephone number and e-mail address, if these are not included on your letterhead.
- If you do not have an electronic version, enter your organization's name, address, phone, fax and e-mail in the top left-hand corner of the cover page.
- Date the page.
- Head it **FINAL NARRATIVE REPORT** followed by:
  - the title of the project;
  - for projects within national programs, the name of the program;
  - the five-digit RWJF grant ID#;
  - the dates covered by the entire grant. If the project has been granted a no-cost extension, indicate the time period of the extension in parentheses;
  - the total amount of the grant; and
  - the goal of the project as described in the proposal.

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*Final Narrative Report*



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## **BIBLIOGRAPHY**

The Bibliography submitted with your Final Narrative Report is a record of certain kinds of products available to the public (e.g., books, journal articles, reports, brochures, Web sites), national/regional events (e.g., conferences and workshops), and published presentations and testimony your project produced. If you produced any of these products, a Bibliography must be provided with the Final Narrative Report. See *Grantee Reporting Instructions: Bibliography Formatting and Submission* for more information.

## **SUBMITTING FINAL NARRATIVE REPORTS AND BIBLIOGRAPHIES**

Within 30 days of the end of your grant period please e-mail these documents to [grantreports@rwjf.org](mailto:grantreports@rwjf.org). Please review *RWJF Electronic Submission Standards* for complete electronic reporting instructions.

Attach an electronic copy of the Final Narrative Report and the Bibliography to your e-mail.

Put the ID# of the grant into the subject line of your e-mail followed by *Report and Bibliography*. If you are sending them separately, use *Report* and *Bibliography*.

Name your Final Narrative Report and Bibliography according to the naming conventions in *RWJF Electronic Submission Standards*.

Your grants administrator will be notified that your Final Narrative Report and Bibliography have arrived and will distribute them within RWJF.

If you are a grantee within a national program with a national program office, also submit one copy of your Final Narrative Report and your Bibliography to your contact at that office. Send your grant products to RWJF and the national program office as soon as they are completed.

## **FINAL NARRATIVE REPORT – QUESTIONS**

- 1. What measurable goals did you set for this project and what indicators did you use to measure your performance? To what extent has your project achieved these goals and levels of performance?** Briefly describe what the project actually did to meet its goals. If the goals of the project have not been met, explain what happened and why. If there were additional accomplishments, describe them, and explain how and why the activities that led to these accomplishments were undertaken. Be as specific as possible. Cover the areas described below that are applicable to your project:
  - If you conducted a review of literature to help direct your project, describe key findings and how they were used.
  - If you worked in collaboration or cooperation with other organizations or institutions, describe those arrangements and their importance to the project. If any of these organizations were subcontractors, please specify which ones, the amount of the contract(s) and the work the subcontractor(s) did on the project.
  - For a service project, indicate the number of people served in total during the project, and what, where and how services were provided, and over what time period. If services are continuing, indicate the number of people currently being served.
  - For a project making individual awards for training, leadership development or recognition, indicate the kinds of awards provided during the grant and the results of the awards, including any special accomplishments.

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- For a project that aimed to create institutional change, indicate the various activities and methods that have been undertaken to effect such change and their success in doing so.
  - For a communications project, describe the products produced, the number produced, the number disseminated and by what means, to whom, the size of the audience reached, when these activities took place, and the reaction received in the media (reviews and media coverage) and in the public sector. If a Web site was produced, provide the address, the name of the organization or individual that started the site, the date it went live, the number of people visiting it on a monthly basis, the content of the site and how it relates to the grant.
  - For an evaluation project, describe the evaluation methodology and the major findings from the evaluation.
  - For a research project, describe the subject matter of the research, the time period, the universe and the response rate (if applicable). If your research depended on existing data, describe how accessible you found the data; if existing data needed to be integrated with data collected by this grant, describe the ease or difficulty of that integration. Describe the major findings of your research. Use a bulleted format, with one bullet for each key finding.
- 2. Did the project encounter internal or external challenges? How were they addressed? Was there something RWJF could have done to assist you?** Describe each challenge and the actions you undertook to address it.
- What was the effect on the project?
  - If a change negatively affected the project, how did you attempt to cope with it?
  - What could RWJF have done to assist you?
- 3. Has your organization received funding from other foundations, corporations or government bodies for the project RWJF has been supporting?**
- If so, please give each funder's name, the amount provided and when it was provided. If you only know the total provided, put that total amount, what funders contributed to it, with any amounts you know for sure that any of these funders provided.
  - If the support is in-kind and you can estimate the dollar amount, provide that figure; if it is in-kind and you cannot estimate the amount, do not include it here.
  - Did RWJF funding help leverage this other funding or was it unrelated?
  - Did the project receive funding after RWJF's funded ended that allowed your organization to continue the work? Please describe the funding: What organization gave it, amount received and when the funding ends. Then describe the work being done with this funding.

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**4. When considering the design and implementation of this project, what lessons did you learn that might help other grantees implement similar work in this field?** Please do not discuss specific findings or results of the project. Instead consider your process of implementing and executing this project, including, for example:

- What steps you took during the planning stages to:
  - involve key stakeholders; and
  - allow for changes in key objectives in response to changes “on the ground.”
- What elements of your implementation strategy worked, or did not work, and why?

**5. What impact do you think the project has had to date? Who can be contacted a few years from now to follow up on the project?** Describe what you believe to be the impact of the project, providing evidence for all statements (e.g., publication in major journals, citations of the project in literature, major press coverage, adoption of the model by other organizations). For example:

- Has the project contributed in some significant way to general knowledge about a subject?  
Or to a change in conventional wisdom?
- Has it increased the public’s access to information?
- Has it created a new model for delivering services or conducting research?
- Has it informed the work of other professionals or organizations?
- Has it informed the work of other researchers?
- Has it changed an institution so that it is better able to fulfill its mission?

Give us the name and contact information of someone who can be contacted in a few years if RWJF wants to follow up on the impact.

**6. What are the post-grant plans for the project if it does not conclude with the grant?**

Include a description of the following that are applicable:

- Changes in operations and scope.
- Replication or use of findings.
- Names of other institutions you expect to involve.
- Plans to support the project financially, including grants you are seeking or have received and/or a business plan to become self-supporting.
- If you obtained matching funds during the grant, has this affected your ability to obtain financial support for the project’s continued operation as the grant ends?
- Communications plans.

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RWJF has an ongoing interest in the effects and accomplishments of your project over the long run and welcomes updates on the continuation, dissemination or replication of your work after your grant is closed. Please e-mail any such news, marked with the grant ID#, to [grantreports@rwjf.org](mailto:grantreports@rwjf.org) with a copy to [GRRU-admin@rwjf.org](mailto:GRRU-admin@rwjf.org) so any posted Grant Results report on the project can be updated. Your news will become part of the record of your grant and automatically be forwarded to your program officer.

## 7. With a perspective on the entire project, what have been its key publications and national/regional communications activities? Did the project meet its communications goals?

- If there have been no communication efforts, say so, and give the reason.
- If there have been national or regional communications activities, describe them here, noting the size of the audience they reached and their significance (e.g., publication in a peer-reviewed journal, speech at a national conference, a press briefing, an unusual and important request for copies of a book or a report). Then describe any plans you may have for the future.
- If your communications activities were local in nature, summarize them here. Such activities include presentations about the project to any number of local organizations or media coverage about the project from an array of local media. For example:
  - “Project staff made 50 presentations about the project across the state of Idaho to organizations such as B’nai B’rith, Area Agencies on Aging and local AARP chapters.”
  - “The project received coverage in 12 newspapers in New Jersey, including the *Montclair Times*, the *Verona/Cedar Grove Sentinel* and the *Summit Express*.”
- If you have produced any products (e.g., books, journal articles, reports, brochures, CDs, DVDs, Web sites) about the project, conducted conferences or workshops, made presentations that were published in proceedings or gave testimony before a governmental body, you are required to submit a Bibliography. The Bibliography does not cover all categories of grant products requested by RWJF. (Instructions for submitting the Bibliography, including categories of entries and entry formats are available in *Grantee Reporting Instructions: Bibliography Formatting and Submission*.)
- For video, audio and all software produced under the grant, if you are sending hard copy, please also mark each item with a two-line description of the contents and when it was produced. These products will become a part of the complete permanent record of your grant.

First review *RWJF Electronic Submission Standards* which describes in detail the products to submit and how to do so. Then read *Bibliography Formatting and Submission* and the bibliography formats to write your Bibliography.

If, after the grant is closed, an article, report or book is published, the project receives media coverage, or there are other significant communications activities, please send them to [grantreports@rwjf.org](mailto:grantreports@rwjf.org) with a copy to [GRRU-admin@rwjf.org](mailto:GRRU-admin@rwjf.org), following the instructions in *RWJF Electronic Submission Standards*. GRRU will update any Grant Results report on the project. If you need to send physical copies of products, follow the instructions in *RWJF Electronic Submission Standards*.

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## *Bibliography Formatting and Submission*



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### **BIBLIOGRAPHY – OVERVIEW AND PURPOSE**

If your grant has resulted in products in any of the bibliography categories listed below, please include a Bibliography with your Final Narrative Report.

- Your Bibliography is a separate document from your Final Narrative Report.
- The Bibliography is NOT a comprehensive listing of every product you have created. It is a record of specific products that are, or will be, available to the public. It provides the information necessary for the public to access your products.
- Products that should be included in the Bibliography are those materials that report on the results, findings, recommendations and conclusions from your project/program. These are knowledge products that have the ability to increase learning and have the potential to drive change in health and health care in the United States.
- If you find, when completing your Annual Narrative Report, Final Narrative Report, or Bibliography, that you have not sent a product to us, submit it as soon as possible. Refer to the [Electronic Submission Standards](#) for details.

### **BIBLIOGRAPHY CATEGORIES**

Only include products from the following categories in your Bibliography. Refer to the [Electronic Submission Standards](#) for examples and details on the materials included in these categories.

**Article:** written by program/project staff; published in journals, magazines, newsletters and newspapers; includes special issues of journals produced through the program/project. Do not include:

- Works in progress, or
- Information about where an unpublished article has been submitted; if accepted but not yet published, do include that information.

**Book & Chapter:** written by project staff.

**Communication & Advocacy:** materials to communicate the program's/project's findings, results, recommendations or solutions to the media and broader public, and to advocate for change. Include only specials produced for television or radio, Web sites/Web pages created for the program/project, uploads to video sites such as YouTube, other social media sites, and blogs/blog responses.

- Include only Web sites produced as part of the program/project or sections devoted to the program/project appearing as part of an existing grantee Web site.
- If a report, article or presentation produced by staff appears on any Web site, it does not belong in this category; instead, list the entry in the appropriate section and include the URL where it can be found.
- For videos on social media sites such as YouTube, Facebook or Twitter, describe the material and provide the URL.

**Data Tapes:** as required under some grants; the tape itself is sent to the Inter-university Consortium for Political and Social Research (ICPSR) at the University of Michigan.

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**Education & Instruction:** materials used to instruct or deliver educational content such as guides, manuals, toolkits, tool boxes, curricula and class materials.

**Meeting & Conference:** proceedings, transcripts and supporting materials from sponsored meetings/workshops; presentations made by project/program staff at sponsored conferences and those of other organizations; and testimony given to government legislative or regulatory bodies.

- Limit meetings to conferences and workshops held as part of the program/project.
- Include workshops held as stand-alone events as part of the program/project. Also include workshops you sponsored within conferences held by other organizations.
- For more information on testimony and advocacy vs. lobbying, see the RWJF [Web site](#).

**Reports (including monographs):** Analysis, synthesis, evaluation, research findings, results of the work, conclusions, recommendations, strategy, lessons learned, data analysis.

### **GUIDELINES AND EXAMPLES FOR ENTRIES AND FORMATS**

Some general guidelines for entries and formats:

- Create a Bibliography cover page with the date and BIBLIOGRAPHY, followed by the title of the program/project, the RWJF grant ID# and the dates covered in the Bibliography.
- Use the italic headings that follow as bibliography entry headings.
- Use postal two-letter state abbreviations.
- Follow dateline city conventions and do not include state abbreviations for dateline cities listed, such as New York, Washington, Chicago and Los Angeles.
- 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*.
- 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*, *date*, 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*, *date*, after the name of the book, book chapter or article).
- For Meeting & Conference, list entries chronologically from most recent to oldest.

#### **Article Format and Examples**

- Author(s) names. “Title of article/op ed, etc.” *Title of publication*, Volume number (issue): inclusive pages, year of publication. Also appears at *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, 2007. Also appears at [www.medjournal.org](http://www.medjournal.org).

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### *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, 2009.

### *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, 2008.

### *Example of article published on a Web site:*

"Measuring the Quality of Care in Palliative Care Services: An Interview with Irene Higginson, Ph.D." Appears at <http://www2.edc.org/lastacts/archives/archivesJan00/featureinn.asp>

### *Example of a magazine article:*

Materson M. "Don't Throw out the Baby with the Bath Water," *Redbook*, 24-26, January 2009.

### *Example of an op ed:*

Brown PE. "Why Health Reform is Necessary." (Op. Ed.) *New York Times*, A32, March 18, 2008. Also appears at [http://www.nytimes.com/2008/03/18/opinion/21Brown/html?\\_r=1&th&emc=th](http://www.nytimes.com/2008/03/18/opinion/21Brown/html?_r=1&th&emc=th).

### *Example of an article published in a newsletter:*

Dickson N. "Getting Veggies into the Local Food Pantry," in Action Now (newsletter). Boston: Feeding America Newsletter, p. 27-28. November 2008.

## **Book & Chapter Format and Examples**

### **Book**

- Name of author(s) or editors(s). Title of book. Place of publication: Publisher, year of publication (or the words *In press*, date, 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, CT: Yale University Press, 2008.

### *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, 2010.

### *Example of an unpublished book:*

*Community Health Leaders: A Collection of Heroes*. Unpublished, 2008.

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 with multiple editors connected to the program/project:*

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, 2007.

- 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.

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- Chapter 2. “Uninsured in America: The Causes and Consequences,” Diane Rowland, Judith Feder and Patricia Seliger Keenan.

### **Book Chapter**

- 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, 2008.

### **Communication & Advocacy Format and Examples**

#### **Television or Radio Specials**

- *Name of the special show*, description of the show. City produced, State: by organization. Aired on what channel, dates it ran.

#### *Example of a television or radio special:*

*Out of Order*, four 30-minute videos on DVD on the health concerns of Generation X. Los Angeles: Rock the Vote. Aired on MTV, May 21–22, 2008.

#### **Material on Video Web sites**

Include video material created by the project that has been posted to a video site such as YouTube.

- “Title of the video.” Organization creating the video, Web address where posted, number of views as of date.

#### *Example of a posted video:*

“TARC Bike Rack Rap.” Metropolitan Transit Authority of Nashville. Available on [http://www.youtube.com/watch?v=eoFFg0W9UME&feature=Playlist&p=790DF11952F8A303&playnext=1&playnext\\_from=PL&index=18](http://www.youtube.com/watch?v=eoFFg0W9UME&feature=Playlist&p=790DF11952F8A303&playnext=1&playnext_from=PL&index=18), 48,769 views as of October 30, 2009.

#### **Web Sites**

- *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/](http://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.

#### **Social Media Web Sites**

Include Facebook, MySpace and other social media sites where the project has a page.

- A brief description of the social media page. *Web address*. Date originated.

#### *Example of a social media site*

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Facebook page on East Bay Youth Center Active Kids project. [www.facebook.com/eastbay](http://www.facebook.com/eastbay). June 2008.

### **Blogs**

Include blogs created by the project or responses by project staff to other organization's blogs on the topic of the project.

#### Created Blog

- Organization creating the blog. "Title of the blog". Organization hosting the blog, date blog or blog response posted. *Web address*.

#### *Example of a blog by the organization*

Sustainable Sacramento, "Keeping Our Parks Green and Clean." [www.sustainablesacramento.org/greenandcleanblog](http://www.sustainablesacramento.org/greenandcleanblog). Posted May 2, 2009

### **Blog Response**

- Author of original blog or respondent to someone else's blog. "Title of the blog". Organization hosting the blog, date blog or response posted. *Web address*.

#### *Example of a blog response:*

Cantrell B. "Quality Care for Kids in My St. Louis Neighborhood." *Health Reform Blog of the Children's Defense Fund*. Appears at [www.childrensdefensefund/healthreform/blog.org](http://www.childrensdefensefund/healthreform/blog.org). Posted May 12, 2009.

### **Datatape Format and Examples**

- "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," Harris Interactive, March–June 2007. Sent to ICPSR April 2002.

### **Education & Instruction Format and Examples**

- *Title of the material*, (type of the material). Place created: Organization producing the material, Date created.

#### *Example of a Manual:*

*Hospital-Sponsored Group Practice: Ingredients for Success*, a 150-minute CD. Chicago: American Hospital Association, 2009.

#### *Example of Toolkit*

*Community Tool Box* (volume 1-2). Kansas City, MO: Kansas Health Foundation, 2008.

#### *Example of Curricula:*

*Palliative Care for Registered Nurses*. (Curricula for 3rd year). San Francisco: University of California, San Francisco, Fall 2007.

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## **Meeting & Conference Format and Examples**

### **Meetings, Conferences and Workshops**

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:*

“2008 National Media Education Conference, Media Education: A Paradigm for Public Health,” June 28–July 1, 2008, 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](http://www.nmec.org).

- “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, 2007, Washington. Attended by 16 newspaper and magazine critics, columnists, editors and network public relations executives.

### **Presentations**

Only include presentations by program/project staff published in proceedings, and indicate the availability of the proceeding, including the Web address if it is available online.

For all presentations and testimony, place in chronological order from oldest to 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](http://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, 2007, Corvallis, OR. Proceedings available at [www.gerontology.org](http://www.gerontology.org).

### **Testimony**

Only include testimony by project/project staff. For testimony, include whether there was a written invitation, and if so, who issued the invitation.

#### *Example of testimony:*

Gary Petersmeyer and Walter Wallaby, “The Facts on SSI’s Support of Disabled Children,” to the Senate Finance Committee, September 15, 2007, Washington. Written request from committee chair, Sen. Peter Piper, August 10, 2007.

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## **Report Format and Examples**

### **Reports and Monographs**

- 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 authored report/monograph:*

Anders R, Gerbman F and Howe D. *Quality Assurance in Health Care Today*. Washington: Brookings Institution, 2007. Also appears at [www.brookings.org](http://www.brookings.org).

*Example of a report or monograph without an author:*

*Primary Care in New York City*. New York: United Hospital Fund, 2008.

### **Fact sheets and Issue Briefs**

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

*Example of a fact sheet or issue brief:*

*Children's Health in California, 2007*. Children Now, June 2008.

### **Chartbooks and Maps**

- *Title of chartbook or map*. (Type of publication) Place of creation: Organization creating, year created.

*Example of a chartbook*

*Chronic Care in Rural America*. (Chartbook). State College, PA: Geisinger Health Clinic, 2008.

*Example of a map*

*Health Insurance Coverage in Kentucky Counties* (maps). Lexington, KY: Southern Institute, 2008.