

National Program Office Reporting Instructions

Overview



Robert Wood Johnson Foundation

INTRODUCTION

We welcome you to the Robert Wood Johnson Foundation (RWJF) community of grantees as the director or deputy director of a national program or as the director of an administrative support office (ASO). We suggest that you familiarize yourself with these requirements for reporting to RWJF. These instructions appear in the National Program Office Guide and on NPONet (log in required), under Managing a National Program. Along with these instructions on NPONet, www.nponet.rwjf.org, we suggest you read the *Notice to National Program Offices* and *RWJF Electronic Reporting Standards*.

If you are contemplating any changes in program scope or objectives, you should contact your RWJF 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*, available on NPONet and at www.rwjf.org/grantees/instructionslist.jsp.)

We hope this will provide you with helpful guidelines as you proceed with your national program. Requirements for Annual Narrative Reports and the Final Narrative Report are brief and identical. ASOs only file these two types of reports with RWJF. If you are filing a report for an ASO, please skip to the top of [page 3](#).

After the last technical assistance and direction (TAD) award ends, a Summative Program Report will be required. At the start of your program, please thoroughly review the *Summative Program Report* instructions beginning on [page 6](#) in this document, and include plans to complete the Summative Program Report in your program planning process. ASOs do not prepare a Summative Program Report.

For national programs that receive reauthorizations to continue their work, Summative Program Reports also may be requested at the time of the reauthorization. Such notice will be sent at least three months before the Summative Program Report is due. This report does not take the place of the Annual Narrative Report or Final Narrative Report for the current TAD grant.

In addition, if a director or deputy director is leaving a national program before its conclusion, he or she must complete a Summative Program Report on the work of the program during his or her tenure. The report will assist the new director or deputy director in managing the program and RWJF in ensuring a smooth transition. RWJF will request a copy of this report.

We therefore suggest that you review the Summative Program Report questions at the start of the national program so you will be prepared to answer them later on.

The Annual Narrative Reports and Final Narrative Report on your TAD grants are the most important substantive documents we ask you to prepare during the life of the national program. Together with your financial reports, these narrative reports are RWJF's principal means of staying informed about the work of the national program office (NPO) on the national program. In the aggregate, reports from NPOs also provide information that is useful in our continuing efforts to improve our grantmaking and grant monitoring processes.

The Bibliography is a separate document that is submitted to RWJF when you file a Final Narrative Report and a Summative Program Report. Instructions for filing a bibliography, including categories of entries and entry formats, are in *National Program Office Reporting Instructions: Bibliography Formatting and Submission*.

We ask you to e-mail electronic versions of all reports and products you produce to grantreports@rwjf.org as individual files as soon as they are complete following the *RWJF Electronic Submission Standards*.

Material in your Annual Narrative Reports, Final Narrative Report, Summative Program Report and Bibliographies may be used by RWJF to prepare a Grant Results report on the national program. These reports are prepared by the Grant Results Reporting Unit in RWJF's Communications Office. The reports

National Program Office Reporting Instructions

Overview

appear on RWJF's Web site at www.rwjf.org/pr/grr.jsp and information contained in them may appear in other RWJF publications as well. We expect you to facilitate the production of the Grant Results report and to review it for accuracy. 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. Your Narrative Reports, Summative Program Report and Bibliographies may thus assist those who can benefit from a record of your experiences in running a national program, what has been learned about the issues addressed by the program, and the results and significance of the program as a whole.

RWJF also has an ongoing interest in the effects and accomplishments of each national program over the long run and welcomes updates on the continuation, dissemination or replication of each program's work after the NPO is closed. Please send any such news to grantreports@rwjf.org with a copy to GRRU-admin@rwjf.org so the posted Grant Results report on the program can be updated.

For questions, please contact your grants administrator.

National Program Office Reporting Instructions

Annual and Final Narrative Reports

ANNUAL AND FINAL NARRATIVE REPORTS—OVERVIEW AND PURPOSE

We have devised a simple set of nine questions for the Annual Narrative Report and the Final Narrative Report.

- Questions 1–8 ask you to tell RWJF about how the overall program is meeting its goals and any challenges it faces; the activities the NPO has engaged in to date to meet the goals of the TAD grant; any activities that have not been completed on schedule; other issues the NPO faces; and the notable accomplishments and key challenges of sites, including surprising findings or results. We expect you to report to us any changes from the planned activities that were described in your proposal or workplan. Upon reading your answers to these questions in your Annual or Final Narrative Report, your program officer may contact you for additional information.
- Question 9 asks you to submit grant products to RWJF *as soon as they are completed* and a Bibliography with your Final Narrative Report.

FORMAT

- The maximum length of an Annual or Final 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 eight questions as bold italic subheads.
- Do not include appendixes, attachments or exhibits in your report except as noted below.
- The Bibliography is a separate report.

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.
- 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.
- Include address, telephone number and e-mail address, if these are not printed on your letterhead.
- Date the page.
- Head it **ANNUAL NARRATIVE REPORT** (Year 1, 2, 3, etc.), or **FINAL NARRATIVE REPORT**, followed by:
 - the title of the program;
 - the five-digit RWJF grant ID# of the TAD grant on which you are reporting;
 - the dates covered in the report;
 - the overall start and end dates of the program;
 - the total amount of the grant; and
 - the goal of the program.

National Program Office Reporting Instructions

Annual and Final Narrative Reports

SUBMITTING ANNUAL AND FINAL NARRATIVE REPORTS BIBLIOGRAPHIES AND PRODUCTS

RWJF will notify you within 30 days after the year-end date or grant-end date to submit to grantreports@rwjf.org:

- An e-mail attached to which is the Annual Narrative Report or Final Narrative Report. If you are filing a Final Narrative Report you also need to file a Bibliography.
- Put the ID# of the grant into the subject line of your e-mail followed by *Report* or *Report and Bibliography* if you are filing both.
- Name your narrative report according to the report naming conventions in *RWJF Electronic Submission Standards*.

Your grants administrator and program officer will be notified that your report has arrived. Based on the information you provide in your Annual or Final Narrative Reports, your program officer may contact you to ask for clarification or additional information.

We want you to send us your grantee products *as soon as they are completed*. E-mail electronic versions in individual files to grantreports@rwjf.org. See *RWJF Electronic Submission Standards* for details.

ANNUAL AND FINAL NARRATIVE REPORT – QUESTIONS

1. **What did the program accomplish during this reporting period?** Briefly describe accomplishments for the program as a whole in this reporting period.
2. **What progress did the NPO make toward meeting the goals outlined in your proposal or workplan for this TAD grant? If relevant, what indicators or benchmarks were used to determine your progress?** Briefly describe the TAD activities carried out this reporting period to meet these goals, as outlined in your proposal and/or workplan. Summarize the assistance your office has provided to the program's sites/projects/trainees during the year, mentioning anything noteworthy.

Include a description of the ways in which the NPO shares information with its sites/projects/trainees that helps them learn from each other's experience (e.g., conference calls, newsletter, e-mail, Web site, Web chat room). Also describe the NPO's reporting requirements for the sites/projects/trainees in the program.

3. **Briefly describe any proposed activities that were not completed, the reasons they were not completed and your plans for carrying them out.**
 - If the activities completed differ from your proposal/workplan, what caused these changes?
 - Were activities delayed and if so, why?
 - Will these activities be completed? When and how?
4. **What were the notable accomplishments of, and key challenges for, your sites/projects/trainees in this reporting period?** Briefly describe accomplishments and challenges, referencing the RWJF grant ID# of each site/project/trainee mentioned.
5. **Did the program overall face challenges in strategy, design or adaptation to external changes?** Briefly describe challenges the program faced in any of these areas.

National Program Office Reporting Instructions

Annual and Final Narrative Reports

6. **Were there surprising findings or results from the work of the sites/projects/trainees?** Briefly describe them, referencing the RWJF grant ID# of the site/project/trainee.
7. **Is there anything else you want to tell RWJF?** Please include an addendum to the report. Feel free to tell us about collaborations, unexpected issues, concerns or successes the program or the NPO has had in this reporting period.
8. **Who is currently serving on your national advisory committee?** Please provide an up-to-date list of members. If they are listed on your Web site, please provide the exact URL of the listing.
9. **What products were produced during the reporting period?** Describe the products produced. As noted earlier, electronic copies of all products should be e-mailed as individual files to grantreports@rwjf.org as soon as they are available. See *RWJF Electronic Submission Standards* for formats and naming conventions for the products you send. If you are filing a Final Narrative Report you also must file a Bibliography. See *National Program Office Reporting Instructions: Bibliography Formatting and Submission* for more information.

National Program Office Reporting Instructions

Summative Program Report

SUMMATIVE PROGRAM REPORT – OVERVIEW AND PURPOSE

The Summative Program Report is a substantive record of the activities conducted by the National Program Office (NPO) during the life of the program, and how these activities helped the national program to meet its goals or objectives. It also describes the national program's accomplishments and challenges overall. In the Summative Program Report, we ask that you cover the following:

- The progress the national program has made in meeting its goals or objectives.
- The NPO's overall role in providing technical assistance and direction to the projects in the national program or oversight to individuals participating in professional training programs.
- The spread of activities and range of progress of the individual project sites, some of which, we recognize, will have moved ahead faster than others.
- The accomplishments of the program's sites/projects/trainees, including your opinions about which were effective and which were not, and which took particularly interesting approaches.

RWJF will request that the NPO file a Summative Program Report when any of the following occur: (1) the national program is coming up for reauthorization; (2) a director or deputy director leaves a program, with the Summative Program Report covering the activities during the director's or deputy director's tenure; or (3) it is the last year of the national program.

- The Summative Program Report does not replace the Narrative Report for the last year of the program.
- When you write your Summative Program Report, include all activities and accomplishments of the entire program to date or until the end if filing at the close of the program.
- The Summative Program Report format consists of 10 questions and is designed to provide essential information about the results, findings and lessons from your national program.
- 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 the Summative Program Report is 50 pages, including any charts and tables. Feel free, however, to submit shorter reports.
- Use a 12-point font, one-inch margins and single-line spacing.
- Incorporate the 10 questions as bold italic subheads.
- The Bibliography is a separate report.

National Program Office Reporting Instructions

Summative Program Report

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.
- 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.
- Date the page.
- Head it **SUMMATIVE PROGRAM REPORT** followed by:
 - the title of the program;
 - the date the program began and the date it will be ending;
 - the five-digit RWJF grant ID# of the current or final TAD grant;
 - the total funding for the national program listed in the call for proposals; and
 - the goal of the program.

BIBLIOGRAPHY

The Bibliography submitted with your Summative Program Report is a complete listing of the NPO's products throughout the program (e.g., books, journal articles, reports, brochures, Web sites), national/regional events (e.g., conferences and workshops), and published presentations and testimony to government bodies. If you produced any products, a Bibliography must be provided with the Final Narrative Report and with the Summative Program Report.

SUBMITTING THE SUMMATIVE REPORT AND BIBLIOGRAPHY

Upon notification from RWJF, please submit to grantreports@rwjf.org:

- An e-mail attached to which is the Summative Program Report and the Bibliography.
- Put the ID# of the final TAD grant into the subject line of your e-mail followed by *Report and Bibliography*.
- Name your Summative Program Report according to the report naming conventions described in *RWJF Electronic Submission Standards*.

Your grants administrator and program officer will be notified that your Summative Program Report and Bibliography have arrived and will distribute them within RWJF.

National Program Office

Reporting Instructions

Summative Program Report

SUMMATIVE PROGRAM REPORT – QUESTIONS

- 1. What measurable goals were set for this national program, and what indicators did you use to measure your performance? To what extent has the program achieved these goals and levels of performance?** Make sure that you describe what the program actually did to meet these goals. Be as specific as possible. If there were additional accomplishments, also describe them, and explain how and why the activities that led to these accomplishments were undertaken. Cover the areas described below that are applicable to the program.
 - If there is a particular theoretical or empirical basis for the program’s structure or methods, describe the key elements, providing citations from the literature.
 - If it is a service program, indicate the number of sites, the organization(s) at each site that provide services and their locations, and the range of methods by which services have been provided. Indicate the number of people served to date and the average number served per site; the kinds of services that were provided by the sites; and where, how and over what time period. Indicate which sites are continuing, the number of people currently being served at each, the services being provided and which organizations are providing them.
 - For a project making individual awards for leadership development or recognition, indicate the kinds of awards provided during this year and the results of the awards, including any special accomplishments of the leaders during the year.
 - If it is a training program, indicate the number and location of training sites, the number of applicants in total, the number of applicants chosen, their placements and the range of accomplishments of those who “graduated” from the program during this authorization period.
 - For a program that aims to create institutional change, indicate the various activities and methods that have been undertaken by the sites to effect such change and describe any changes that have occurred.
 - If it is a research program, describe the categories of research undertaken. Then list the research projects in each category, referring to their RWJF grant ID#s (if funded directly by RWJF). If the research has changed focus over time, describe why those changes occurred. Next, describe the key findings of the most significant research projects conducted under the program, indicating the name of the project and its grant ID# (if funded directly by RWJF), and the institution running the project. Use a bulleted format, with one bullet for each key finding. Include at least one project from each research category.
- 2. How has the NPO supported the program’s accomplishments?** Summarize the assistance the NPO has provided to program sites throughout the program’s life, including noteworthy accomplishments. Be sure to include how the NPO shared information with program sites in ways that helped sites learn from each other’s experience (e.g., conference calls, newsletter, e-mail, Web site, Web chat room).

National Program Office Reporting Instructions

Summative Program Report

3. **Did the NPO and/or any of the program's projects encounter internal or external challenges? How were they addressed?** Describe each challenge and the actions the NPO undertook to address it.

- Was the problem expected or unexpected?
- What was the effect on the program as a whole?
- Was the program well timed to take advantage of the external environment or has it suffered from its timing? How?
- Were there unanticipated changes in external factors that caused problems? In what way?
- If the changes negatively affected the program as a whole or any particular project sites, how did the NPO attempt to cope with them? What lessons might be applicable to other RWJF national programs?
- What could RWJF have done to assist you?
- If no challenges have been encountered, say so.

4. **If there were NPO or project/site collaborations, were there any challenges or positive results of those relationships for NPO and the projects/sites?** Describe the arrangements and their high points and shortfalls, with a focus on offering useful insights to RWJF and other NPOs with similar arrangements.

5. **What have the sites/projects/trainees in the national program accomplished and what challenges and shortfalls have they encountered?** In one to two pages each, describe the major activities and most significant accomplishments and challenges for each of the projects in the national program.

- **For programs with more than 10 projects**, describe the range of activities that were conducted by projects and the scope of their accomplishments and challenges, highlighting those that have been unusually distinctive, and including their RWJF grant ID#s. Then write individual project descriptions of one to two pages each for 10 projects, choosing the ones that have been noteworthy. Include their RWJF grant ID#s.
- **For training programs**, briefly describe the range of the activities of trainees in the cohorts during this authorization period, their accomplishments and problems, highlighting those that have been unusually distinctive. Then, write one- to two-page descriptions of the activities, accomplishments and problems of 25 percent of the trainees during this authorization (but no fewer than three per year), choosing the ones that have been noteworthy.

6. **What lessons did the program's director and key staff members learn from running this NPO?**

- What lessons do the successes and/or shortfalls of the program have for other NPOs attempting to manage similar efforts?
- What would you recommend to other NPOs to emulate and/or to avoid?

National Program Office

Reporting Instructions

Summative Program Report

7. **What impact do you think the program has had to date? Who can be contacted a few years from now to follow up on the program?** Describe what you believe to be the impact of the program, providing evidence for all statements (e.g., publication in major journals, citations of the program or its sites/projects/trainees' work in literature, major press coverage, adoption of the model by other organizations, changes in policy, professional practice or behavior). For example:

- Has the program contributed in some significant way to general knowledge about a subject? Or a change in conventional wisdom?
- Has it informed the work of other professionals or organizations?
- Has it informed the work of other researchers?
- Has it informed public policy?
- Has it increased access to information for any other important segment of the public (e.g., patients and their families, journalists, specific groups of policy-makers)?
- Has it created a new model for delivering services or conducting research, and if so, has this model been widely adopted?
- Has it changed institutions so that they can fulfill their missions?

If the director and deputy director are leaving at the end of the program, indicate the name of the ongoing contact person at the institutional home of the NPO who can be contacted in a few years if RWJF wants to follow up on the program's impact.

8. **Who served on your final national advisory committee?** Provide a list of members, or if they are listed on your Web site, provide the URL for that page.

9. **If the program is in its final year, what are the post-program plans once the NPO closes?** Include a description of the following that are applicable:

- changes in operations and scope in any individual projects/sites that are continuing;
- replication or use of findings;
- names of other institutions that projects or sites expect to involve;
- plans to support the program financially, including grants the NPO or projects/sites are seeking and/or a business plan to become self-supporting;
- evaluation of the impact of a matching funds requirement on the ability to obtain financial support for its continued operation as the national program ends;
- communications plans (e.g., articles, reports or books, or if the program expects media coverage).

RWJF has an ongoing interest in the long-term effects and accomplishments of each national program and welcomes updates on the continuation, dissemination or replication of each program's work after the NPO is closed. Please send any such news to grantreports@rwjf.org and a copy to GRRU-admin@rwjf.org. It will become part of the record of the program and automatically be forwarded to your program officer. The Grant Results Reporting Unit (GRRU) in RWJF's Communications Office produces Grant Results reports on all completed programs and on RWJF's ongoing programs and will update a posted report with new information. Grant Results reports are posted on www.rwjf.org/pr/grr.jsp.

National Program Office Reporting Instructions

Summative Program Report

10. What have been the NPO's key publications and national/regional communications activities over the life of the national program? Has the national program met its communications goals?

- If there have been national or regional communications activities, describe them, noting the size of the audience they reached and their significance (e.g., publication in a major journal, speech at a major conference, a press briefing, an unusual and important request for copies of a book or a report).
- If the NPO produced any products (e.g., books, journal articles, reports, brochures, CD-ROMs, audiovisuals, Web site) about the national program, conducted conferences or workshops or made presentations published in proceedings or gave testimony before governmental bodies, you are required to submit a Bibliography. The Bibliography does not cover all categories of grant products requested by RWJF. See *National Program Office Reporting Instructions: Bibliography Formatting and Submission*.

The Bibliography is a separate document.

Submit products electronically to grantreports@rwjf.org as individual files as soon as they are completed. Follow the instructions for naming the files and file formats in *RWJF Electronic Submission Standards*. Put the ID# of the final TAD grant in the subject line of the e-mail followed by the word *Product*.

If, after the national program is closed, an article, report or book is published, the national program receives media coverage, or there are other significant communications activities, please e-mail electronic versions of the products to grantreports@rwjf.org with a copy to GRRU-admin@rwjf.org, following the instructions in *RWJF Electronic Submission Standards*. GRRU will update the Grant Results report on the program. If you need to send physical copies of products, follow the instructions in *RWJF Electronic Submission Standards*.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

BIBLIOGRAPHY

BIBLIOGRAPHY OVERVIEW AND PURPOSE

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

- Your Bibliography is a separate document from your narrative or summative report.
- The purpose of the Bibliography is to provide information about the products produced by the program office, not about the receipt of the grants or the organization receiving the funding.
- The Bibliography is NOT a comprehensive listing of every product you have created. It is a record of certain kinds of products that are available to the public ONLY in the categories listed below.
- If products types are not listed in the Bibliography, send them to RWJF as described in *RWJF Electronic Submission Standards*, but do NOT include them in the Bibliography.
- When submitting the Bibliography, make sure to indicate, under each entry, the date you sent each product to RWJF. If you find you missed sending in a product (or think you may have), send it separately to grantreports@rwjf.org. Do NOT send a duplicate copy of the product with the Bibliography.

COVER PAGE

Create a Bibliography cover page with the date and **BIBLIOGRAPHY**, followed by the title of the program, the RWJF grant ID# of the closing technical assistance and direction grant and the dates covered by the Bibliography.

BIBLIOGRAPHY CATEGORIES

Books including monographs

Book Chapters

Articles written by program office staff about the program's results and/or findings including abstracts, articles in journals (including special issues and supplements), blogs, commentaries, editorials, Internet publications, Internet postings, magazine articles, newsletter articles, newspaper editorials, letters to the editor.

Reports including evaluations, fact sheets, fellows' reports, issue briefs, newsletters created for the program, policy reports, profiles, research highlights, special reports, syntheses, white papers. Also includes:

Charts and Data such as chart books, chart packs, data reports, maps, survey results.

Education and Instruction Materials such as manuals, primers, toolkits and training guides.

Audiovisuals and Software including CDs, DVDs, applications and toolboxes.

Survey Instruments only those created by the program office; do not include adapted surveys.

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

Web Sites for the program.

Sponsored Conferences and Workshops by the program office for the program.

Presentations and Testimony only at national meetings where a presentation appears in a published proceeding or is accompanied by a PowerPoint® document or other formal materials; and testimony at the federal and state level.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

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).

Some general guidelines for entries and formats:

- 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, 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* and *New England Journal of Medicine*.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

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, 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, 2009.

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 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, 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.
- 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 the chapter appears, Editor name (ed). Place of publication: Publisher, year of publication (use In press, date, 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.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

Articles

Limit these 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. 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.

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, 2009

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 2009 issue. Appears at www2.edc.org/palliative.

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, 2007. Also appears at www.brookings.org.

Example of a report without an author:

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

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, 2007. Children Now, June 2008.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

Audiovisuals and Software

Include audios, CDs, DVDs and software programs produced as part of the program.

- *Title of production*, brief description of the audio, CD, DVD or computer software. Place of publication: Publisher, Date of publication or airing.

Example of an audio:

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

Example of a video:

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.

Example of software:

Body Systems and Patient Care, Computer-Assisted Learning Lessons Project, an interactive computer program on CD-ROM. Northampton, MA: Smith College, 2007.

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,” Harris Interactive, fielded May–August 2008.

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,” Harris Interactive, March–June 2007. Sent to ICPSR April 2008.

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.

National Program Office

Reporting Instructions

Bibliography Formatting and Submission

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:

“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.nmcc.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, 2007, 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, 2007, Corvallis, OR. Proceedings of the meeting available at www.gerontology.org.

National Program Office Reporting Instructions

Bibliography Formatting and Submission

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, 2007.