Overview and Purpose

The Summative Report is a substantive record of the overall programmatic accomplishments, challenges, and lessons of an initiative, center, or programmatic effort funded through an authorization by the Robert Wood Johnson Foundation (RWJF) Board of Trustees or through a series of ad hoc grants. We use the word “initiative” to refer to all of these programmatic efforts without a national program office.

Although you have been filing Annual Narrative Reports and Final Narrative Reports about the grants, at the end of the work on the initiative, we want you to file a Summative Report on the results of all the work conducted under your grants.

In the Summative Report, we ask that you cover the following:

• The progress the initiative has made overall in meeting its goals or objectives

• Your role in guiding the work of the initiative, such as by providing technical assistance and direction to institutions participating in the initiative or oversight to individuals participating in professional training

• The spread of activities and range of progress of the participating entities, some of which, we recognize, will have moved ahead faster than others

• The accomplishments of the initiative’s partners or participating entities, including your opinions about which were effective and which were not, and which took particularly interesting approaches

The Summative Report does not replace the Final Narrative Report for the final award.

• When you write your Summative Report, include all activities and accomplishments of the entire initiative to date.
The Summative Report format consists of 13 questions and is designed to provide essential information about the results, findings, and lessons from your initiative.

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 Report is 50 pages, including any charts and tables but excluding the Bibliography. Feel free, however, to submit shorter reports.

Use a 12-point font, one-inch margins and single line spacing.

Incorporate the 13 questions as bold italic subheads.

The Bibliography should encompass all publications you have noted in prior Final Narrative Reports, and be filed as part of the Summative Report.

Send the report as a PDF file.

**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 email 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 email in the top left-hand corner of the Cover Page.

Date the page.

Title it “Summative Report” or “Summative Report With Bibliography” followed by:

- The title of the initiative
- The date the initiative began and the date it is ending
- The five-digit RWJF grant ID of the final grant
- The total funding for the initiative
- The goal of the initiative

**Summative Bibliography**

The Bibliography is part of your Summative Report. It is a comprehensive catalog of the products your organization (or subcontractors) produced throughout the initiative (e.g., articles, books, reports,
websites), national/regional events (e.g., conferences and workshops, and invited testimony to
government bodies).

**Submitting the Summative Report and its Summative Bibliography**

Upon notification from RWJF, please submit the Summative Report to grantreports@rwjf.org.

- Put the final grant ID and the words “Summative Report” or “Summative Report With Bibliography” in the subject field of the email.
- Attach an electronic copy of the Summative Report to the email.
- Name the report according to the report naming conventions described in the *Electronic Submission Standards*.

Your program financial analyst will be notified that your Summative 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.

Answer the questions below as they apply to your endeavor. Remember that we use the word “initiative” to make for easier reading.

**Summative Report—Questions**

1. **What goals were set for this initiative; and how well do you think the initiative met these goals?**
   **Do you have any measures of its performance?** To what extent has the initiative achieved these
goals and levels of performance? Make sure that you describe what the initiative 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 initiative.

   — **If there is a particular theoretical or empirical basis for the initiative’s structure or methods,** describe the key elements, providing citations from the literature.

   — **For a service initiative,** 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 an initiative 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.

   — **For a training initiative,** 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 initiative.
— For an initiative creating a network, partnerships, or strategic collaborations, indicate the accomplishments of the network, partnerships, or strategic collaborations.

— For an initiative that aims to create institutional change, indicate the various activities and methods that have been undertaken by your organization, the sites, fellows or participating entities to effect such change, and describe any changes that have occurred.

— For a research initiative, describe the categories of research undertaken. If the research has changed focus over time, describe why those changes occurred. Next, describe the key findings of the most significant research conducted under the initiative, and the institution(s) running the research. Use a bulleted format, with one bullet for each key finding.

— For centers, please describe the accomplishments of your work in building a field, coordinating RWJF’s work in the field, and working with other institutions.

— For an initiative engaged in advocacy around policy change, describe the activities over the entire grant period and their accomplishments. Describe the products produced and how they were used for advocacy.

For all initiatives conducting public opinion surveys and/or qualitative research for public release, please note:

To provide reliable and objective information that meets the highest standards, RWJF-funded public opinion, survey, and qualitative research that are publicly released must conform to the Code of Ethics and Practices of the American Association for Public Opinion Research (AAPOR), revised in 2015 and available at [http://www.aapor.org/Standards-Ethics/AAPOR-Code-of-Ethics.aspx](http://www.aapor.org/Standards-Ethics/AAPOR-Code-of-Ethics.aspx).

Public Opinion and Survey Research

Public opinion and survey research, as defined by AAPOR, refers to the systematic collection and analysis of information from or about individuals, groups, or organizations concerning their behaviors, cognitions, attitudes, or other characteristics. It encompasses both quantitative and qualitative research methods, traditional or emerging.

Publicly released RWJF-funded public opinion and survey research must be consistent with the AAPOR Code. The main requirements of the Code include, but are not limited to, the following:

— Identify the name(s) of the lead researcher(s), their organizational affiliation(s), and all sponsors/funders of the research.

— Employ research tools and methods appropriate for the topics and questions being investigated.


— If research is being conducted using a non-probability-based online panel, researchers must clearly indicate that respondents self-selected into the sample and were not randomly selected
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from the full population of interest. AAPOR recommends the following wording for use in online and other surveys conducted among self-selected individuals:

“Respondents for this survey were selected from among those who have [volunteered to participate/registered to participate in (company name) online surveys and polls]. The data [have been/have not been] weighted to reflect the demographic composition of [target population]. Because the sample is based on those who initially self-selected for participation [in the panel] rather than a probability sample, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error including but not limited to sampling error, coverage error, and measurement error.” (Source: AAPOR Opt-In Surveys and Margin of Error at http://www.aapor.org/Education-Resources/For-Researchers/Poll-Survey-FAQ/Opt-In-Surveys-and-Margin-of-Error.aspx.)

Qualitative Research

As per the AAPOR definition, qualitative research includes focus group, in-depth interviews, case studies, narrative research, and ethnography, among other approaches. This research generally involves descriptive, unstructured data. Please include the following information in any report of qualitative research:

— Who sponsored the research and who conducted it. If it was funded by another entity, also include that information.

— A definition of the population studied and its geographic location

— The instrumentation used (e.g., questionnaires, discussion guides), a description of the data collection strategies employed (e.g., focus groups, semi-structured interviews), and the languages(s) used

— A description of any relevant stimuli, such as visual or sensory exhibits or show cards

— Dates of data collection

— The physical location of all data collection activities (e.g., subject home, office/workplace, clinic, focus group facility, street corner)

— A description of subject eligibility (e.g., age or gender requirements) and the procedures employed to screen and recruit research subjects

— The number of research subjects, by data collection strategy

— Methods of interviewer and/or code training, supervision, and monitoring, if interviewers or coders were used

— Duration of research participation (e.g., length of interviews, focus group sessions)

— Any compensation/incentives provided to research subjects

— Information regarding whether or not data collection included audio or video recordings
Process for Release of Data and/or Reporting

An RWJF communications or program officer in partnership with a Research-Evaluation-Learning officer must review and approve material for balance and accuracy and to assure appropriate reporting standards have been met. The Foundation should be given at least 48 hours’ notice; longer if the document is long and complicated. In an email, provide for RWJF reviewers:

— A completed Survey Results form, to include details on how the research was conducted in accordance with AAPOR standards

— A copy of the full questionnaire or survey tool

Review of Materials Not Intended for Public Release

The Foundation encourages that all funded public opinion, survey, and qualitative research, regardless of whether it will be released publicly, comply with the AAPOR Code of Ethics.

For all initiatives engaged in advocacy activities, please note:

As you prepare your report, please remember that RWJF values a nonpartisan and open-minded approach that is respectful of all views. In addition, RWJF funds cannot be used for direct or grassroots lobbying or for intervention in any campaign for public office.

In the descriptions of your work, please refrain from language that may be considered by some to be derogatory or partisan. In addition, if you are describing your successes in achieving policy changes through the passage of legislation, describe how you used RWJF funds for nonlobbying activities. (For example, you used RWJF funds to develop and distribute nonpartisan research and analysis that established the need for the legislation or engaged in public education campaigns that did not include “calls to action.”)

If you are describing communications with legislators or grassroots campaigns that were funded with RWJF dollars, please provide sufficient information for RWJF to determine that no funds were used for lobbying. (For example, if you describe providing technical assistance or testimony to a legislative committee, please specify that you did so in response to the committee’s written request for technical assistance or that this work was supported by non-RWJF resources.) If you wish to describe lobbying activities (e.g., meeting with legislators to encourage passage of a bill or conducting a grassroots letter-writing campaign urging a legislative body to pass a bill) that you conducted with other funding to complement your RWJF-funded work, please specify that such activities were funded by non-RWJF sources. If your initiative bears the RWJF name, you may not engage in these activities even if funded by others because it could be construed as RWJF engaging in lobbying. If you have any questions about preparing your report, please refer to the RWJF website or contact your RWJF program officer.

2. **How has your institution supported the initiative’s accomplishments?** Summarize the assistance provided to initiative sites, leaders, partners, and participating institutions throughout the initiative’s life, including noteworthy accomplishments. Be sure to include how you shared information with
those involved with the initiative in ways that helped them learn from each other’s experience (e.g., conference calls, newsletter, email, website, Web chat room).

3. **Do you have any stories that capture the impact of this initiative?** If so, please share one to two. Examples of what we are interested in include stories of people/communities the initiative has helped; lives that have changed; work that led to policy change, such as legislation or regulation; and research breakthroughs.

4. **Did RWJF assist or hinder your work in any way?** For example:
   - Have RWJF’s instructions and messages been consistent or have you gotten different messages from different RWJF staff (e.g. communications and initiative, or initiative and financial)?
   - Did RWJF help you develop relationships with other initiatives/institutions/grantees working toward RWJF’s objectives?
   - Has RWJF provided assistance on other matters such as communications training, social media training, or connecting to members of Congress? How helpful was this assistance?
   - Has RWJF helped you with sustaining the work after funding ends? If so, what type of assistance did RWJF provide?

5. **Did your organization, the initiative’s grantees, or other participating institutions encounter internal or external challenges? How were they addressed?** Describe each challenge and the actions you undertook to address it.
   - Was the problem expected or unexpected?
   - What was the effect on the initiative as a whole?
   - Was the initiative 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 initiative as a whole or any particular sites, how did you attempt to cope with them? What lessons might be applicable to other RWJF national initiatives?
   - What could RWJF have done to assist you?
   - If no challenges have been encountered, say so.

6. **If there were management, network, partnerships, or other collaborations, were there any challenges or positive results of those relationships?** Describe the arrangements and their high points and shortfalls, with a focus on offering useful insights to RWJF and other RWJF-supported institutions with similar arrangements.

7. **What lessons did the initiative’s director and key staff members learn from running this initiative?** Please do not discuss specific results of the initiative. Instead consider your process of implementing and executing the initiative, including, for example:
What steps you took during the planning stages to:

- Involve key stakeholders
- 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?

Is there anything you would do differently? If so, what?

What lessons do the successes and/or shortfalls of the initiative have for other RWJF-funded initiatives?

What would you recommend to others to emulate and/or to avoid?

What are some effective ways to sustain or spread an initiative’s work after RWJF funding ends?

8. What impact do you think the initiative has had to date? Who from outside the initiative could be called on to comment on its impact? Describe what you believe to be the impact of the initiative, providing evidence for all statements (e.g., publication in major journals; citations of the initiative 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 initiative 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? How?

- Has it informed the work of other researchers? How?

- Has it informed public policy? How?

- Has it increased access to information for any other important segment of the public (e.g., patients and their families, journalists, specific groups of policymakers)?

- 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? How?

Give us the name and contact information of someone outside the initiative who can be contacted to comment on the impact of the initiative.

Also give us the name and contact information of someone connected to the initiative with whom RWJF could follow up a few years.

9. If you had a national advisory committee, who served on it? Provide a list of members at the end of the initiative, or if they are listed on your website, provide the URL for that page.
10. **With a perspective on the entire initiative, what were its most effective communications and advocacy approaches? What have been its key publications and national/regional communications activities? Did the initiative meet 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 managing entity produced any products (e.g., articles, books, reports, websites) about the initiative, conducted conferences or workshops, made presentations that were published in proceedings, or gave testimony before governmental bodies, you are required to include a Bibliography at the end of your Summative Report. The Bibliography does not cover all categories of grant products requested by RWJF, and it asks for information on some categories where RWJF does not want products. (See the Bibliography Formatting and Submission section of these instructions to learn about the Bibliography, including categories of entries and entry formats.)

   — If you are sending hard copy of a product (e.g., book, video, software), 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.

   — If you have given testimony before any legislative body (local, state, or federal), you must attach a copy of the Testimony Coversheet to the testimony when you send it to grantreports@rwjf.org. Please note that copies of testimony that are not accompanied by a completed Testimony Coversheet will be rejected.

   — If your initiative received print coverage during the period since your last narrative report, see the Electronic Submission Standards for instructions.

   — If your initiative has a website that needs to be turned over to RWJF, email websupport@rwjf.org to let us know of this need. We will work with you to keep the site online.

Submit products electronically to grantreports@rwjf.org as individual files as soon as they are available. Follow the instructions for naming the files and file formats in the Electronic Submission Standards. Put the ID of the final grant in the subject line of the email followed by the word “Product.”

If, after the initiative is closed, an article, report, or book is published, the national initiative receives media coverage, or there are other significant communications activities, please email electronic versions of the products to grantreports@rwjf.org following the instructions in the Electronic Submission Standards.

11. **What are the post-funding plans once the managing entity 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 initiative financially, including grants the your organization is seeking or has received 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 initiative ends

— Communications plans (e.g., articles, reports or books, or if the initiative expects media coverage)

RWJF has an ongoing interest in the long-term effects and accomplishments of each national initiative and welcomes updates on the continuation, dissemination, or replication of each initiative’s work after it closes. Please send any such news to grantreports@rwjf.org, along with any relevant material, marked with the RWJF grant ID and the name of the initiative.
BIBLIOGRAPHY

Overview and Purpose
If your initiative has resulted in products in any of the bibliography categories listed below, please include a Bibliography as part of your Summative 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.
- Include in the Bibliography only those materials that your staff or subcontractors have created that report on the results, findings, recommendations, and conclusions from your initiative.
- There are products not included in the Bibliography, such as coverage and data tapes, that we want you to send RWJF as soon as they are available. See Electronic Submission Standards document.

Bibliography Guidelines, Categories, and Examples of Entries and Formats
Some general guidelines for entries and formats:

- Use the bold and bold/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.
- Use an en dash, not a hyphen, to indicated inclusive page numbers.
- 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,” then give the expected publication date after the name of the journal or the publisher.
- Finally, list those works that are completed, being submitted for publication, or are unpublished. For those situations, use the word “Unpublished” after the name of the book, book chapter, or article. Also include where the work has been submitted, if it has been.
- For products from meetings or conferences (including presentations and testimony), list entries chronologically from most recent to oldest.
- Provide information about products that appear online. Include the exact website URL. Do not use the main URL for the site. For example, do not use www.healthaffairs.org. Instead, use the specific URL
for the location of the article: http://content.healthaffairs.org/content/28/2/w180.long. A DOI (digital object identifier) link is preferred (if one is made available by the publisher), as they are more stable and are being used by the publishing industry for that reason. Formats indicate where to place URLs or DOIs.

- Include only products produced by the grantee organization or initiative staff (and subcontractors) from the following categories in your Bibliography. Use as subheads the broad category names (Articles, Books or Chapters, etc.), not the entry types (Commentaries, Journal Articles, etc.).

**Articles**

Category includes:

- **Commentaries**—editorials, letters to the editor, op-eds
- **Journal Articles**—including those published only on the Web
- **Journal Supplements and Special Issues**—focused on the topic of the grant
- **Non-Journal Articles**—such as in magazines, newspapers, or newsletters

Do not include works in progress.

Whether published in a journal, a newspaper, or a magazine/newsletter, if there is a volume and issue number, include it, followed by the year only. If there is no volume or issue number, use actual date (month or months, day, and year), abbreviating month name(s). For a seasonal issue (e.g., spring or fall), include the season in the date.

If a DOI address for the online version is made available by the publisher, use it instead of the URL.

**Commentaries**

Author(s) names. “Title of Article/Op Ed” (nature of the commentary). *Title of publication*. Inclusive page numbers, month and date of publication; OR volume number(issue): inclusive pages. Available at *URL of website*.

Example of a commentary:


Or


**Journal Articles**
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Author(s) names. “Title of Article.” Title of publication. volume number(issue): inclusive pages, year. Available at specific URL for the article or DOI made available by the publisher.

Example of a published article:

Example of an article published in a supplement:

Example of article published only on a website:
“Measuring the Quality of Care in Palliative Care Services: An interview With Irene Higginson, Ph.D.” March 2011. Available at www.rwjf.org/pr/65013id.

Example of article that has been accepted but not published:

Example of article that has been written and submitted for publication:

Example of an article that is unpublished.
Chouy G. “Inequality in our Hospitals.” Unpublished.

Journal Supplements or Special Issues

Title of publication. volume number(issue), year. Available at specific URL for the supplement or special issue, or the DOI for it, if available.

• “Title of article,” author names—last name then initial(s), page numbers.
• “Title of article,” author names—last name then initial(s), page numbers.
• Continue for all articles

Example of a journal supplement or special issue:
Prevention. 39(Suppl. 3), 2011
• “Teens and Smoking,” Orleans CT, 3–5.
• “Cessation Services for Teens,” Chaloupka F, 6–9.

Non-Journal Articles
Non-National Program Office  
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Bibliography Creation and Formatting

Author(s) names. “Title of article,” Title of publication, inclusive pages, month year of publication. Available at specific URL for the supplement or special issue, or the DOI for it, if available.

Example of a magazine article:

Example of an article published in a newsletter:
Dickson N. “Getting Veggies Into the Local Food Pantry,” in Action Now newsletter of Feeding America, 27–28, April 2011.

Books and Chapters

Category includes:

• Books—edited or written by grantee staff member(s) on the topic of the grant
• Chapters—written by grantee staff member on the topic of the grant published in books not written wholly by the staff member

Do not include works in progress.

Books

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 published book:

Example of a book accepted but not yet published:

Example of an unpublished book:

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 last name and first initial. Use bullets, ending each bulleted item with a period.

Example of a book with multiple authors connected to the initiative:

- Chapter 1. “Health Care for Poor and Uninsured in the Future—Why It Won’t Be Business as Usual,” Altman SH, Reinhardt UE, Shields AE.


Chapters

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 (if not yet published but accepted, use In press instead of the date).

Example of a published chapter:

**Communications, Promotion, and Official Correspondence**

Materials created to communicate the initiative’s findings, results, recommendations, or solutions to the media and broader public. Category includes:

- **Advertisements**—materials created to promote a given perspective, event or opinion presented in advertisements or public service announcements

- **Blogs**—started by grantee staff and focused on the initiative

- **Documentaries**—such as shows produced for HBO, NPR, PBS, or as an independent film

- **Grantee Profiles**—articles or other write-ups about the initiative, an organization created for the initiative, or a person engaged in or helped by the initiative for the purpose of promoting the initiative

- **Grantee Websites**—a new website for the initiative or pages on a grantee website devoted to the initiative

- **Official Correspondence**—Official correspondence directly related to grant deliverables (examples include, but are not limited to: comments submitted to any local, state, or federal agency concerning rule-making/regulatory issues, letters to agencies requesting enforcement actions related to existing laws, letters directed to corporations requesting changes to corporate practices)

- **Social Media**—posts of video or other program materials to other websites such as YouTube or Facebook

In this section, do not include a report, article, or presentation produced by initiative staff that appears on a website. Instead, list the entry in the appropriate section of the Bibliography and include the URL of website.
Advertisements

“Headline of advertisement,” first appeared in *Title of newspaper, magazine, or radio or television program*, date of publication. Names of other venues where the advertisement appeared (date of publication or broadcast).

Example of an advertisement:


Blogs

Organization creating the blog. “Title of the blog.” date blog or blog response posted. *Web address.*

Example of a blog by the organization:


Documentaries

“Name of show,” hosted by, directed by, or produced by author(s). Short description produced for name of station. First aired date (abbreviate months).

Example of a documentary that aired on television:

“Dying in America,” hosted by Bill Moyers. Four one-hour segments produced for PBS. First aired Nov. 15, 2003.

Example of a documentary film:


Grantee Profiles

*Title of Profile/Story.* Created by organization. Place of publication: Organization publishing the profile, date issued. Available at *URL of website.*

Example of a grantee profile or story:


Grantee Websites

*Web address.* A brief description of the site. Place of origin: organization or individual to whom website belongs.
Example of an initiative website:

www.painpolicy.wisc.edu. Website 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.

**Official Correspondence**

Last name, first name of person sending the comment or correspondence. Topic of correspondence, to whom it was directed, title of that person, date it was sent.

Example of correspondence:

McSulla, Greg. Letter to the FDA concerning regulations around labeling of GMO foods, sent to Brian Sullivan, director of food labeling, March 18, 2015.

**Social Media**

Name of social media on subject of the page, Web address where posted, number of views as of date.

Example of a social media page:

Facebook page on East Bay Youth Center Active Kids project, www.facebook.com/eastbay, 30,549 views as of June 2014.

For a video created by the initiative and posted to a website such as YouTube, use the format:

“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, posted to YouTube, http://www.youtube.com/watch?v=e0FFg0W9UME, 68,832 views as of March 28, 2011.

**Data Tapes**

This category is for listing data tapes required under some awards. The tape itself is sent to the Inter-university Consortium for Political and Social Research at the University of Michigan.

**Data Tapes**

“Name of Data Tape,” 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 data tape:

Presentations, Proceedings, and Testimony

This category includes:

- **Presentations**—those made by grantee staff whether alone, in panels, or in poster presentations, including those that are published in conference proceedings from the grantee organization or another organization

- **Proceedings**—published proceedings or summary of a sponsored meeting, conference or workshop if available online or through the sponsoring organization

- **Testimony**—testimony and materials for testimony given to government legislative or regulatory bodies upon written invitation

Do not include:

- Similar/identical presentations made at multiple venues. Instead, include the presentation once then mention the other venues at which it was made.

- Similar meetings or workshops if given at multiple venues. Instead include the title once and then mention the other venues at which it occurred.

- Conferences, meetings, or workshops that have no published proceedings

- Testimony that you have not submitted to RWJF with a *Testimony Coversheet*

**Presentations**

Name of presenter(s), “Title of Presentation,” (type 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, Place meeting held. Available at [URL of website].

Example of a presentation:


**Proceedings**

Include only those proceedings of conferences and meetings available through the sponsoring organization or on a website.

“Title of conference or meeting,” 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 [URL of website].

Example of a proceeding from a sponsored conference:

Testimony

Only include testimony by initiative staff. For testimony, include whether there was a written invitation, and if so, what government entity issued the invitation. Fill out the Testimony Coversheet, available online when you submit the testimony. Do not include testimony in the Bibliography if you have not filled out a Testimony Coversheet.

Example of testimony:


Reports

Category includes:

• **Case Studies**—a detailed analysis of a person, group, or project

• **Charts, Chartbooks, and Maps**—charts and data reports, chartbooks, chartpacks, and interactive maps that include data

• **Evaluation Reports**—the findings from evaluations

• **Fact Sheets**—presenting a list of facts about the initiative

• **Issue, Policy, and Research Briefs**—issue briefs, policy briefs, legislative scans or reports, policy synthesis, and research highlights

• **Reports**—monographs, chronology, final or preliminary findings, thesis/dissertation, white papers, and background papers prepared for discussion at a conference or workshop, including executive summaries if published separately

• **Survey and Poll Results Reports**—survey reports and survey synthesis reports

Do not include annual reports of the grantee organization.

Case Studies

Name of author(s) or editors(s). *Title of Case Study*. Place of publication: Publisher, year of publication. Available at [URL of website].
Example of an authored case study:

**Charts, Chartbooks, and Maps**

*Title of Chart, Chartbook, or Map* (type of publication). Place of creation: Organization creating, year created. Available at [URL of website](#).

Example of a chartbook:


Example of a map:


**Evaluation Reports**

Name of author(s) or editors(s). *Title of Evaluation Report*. Place of publication: Publisher, year of publication. Available at [URL of website](#).

Example of an evaluation report:


**Fact Sheets**

*Title of Fact Sheet*. Place of publication: Organization publishing the fact sheet, date issued. Available at [URL of website](#).

Example of a fact sheet:


**Issue, Policy, and Research Briefs**

*Title of Brief*. Place of publication: Organization publishing the issue or policy brief, date issued. Available at [URL of website](#).

Example of an issue, policy, or research brief (most will not have authors):


**Reports**

If the executive summary was published separately, list the URL for it separately.
Bibliography Creation and Formatting

Name of author(s) or editors(s). *Title of report*. Place of publication: Publisher, year of publication. Available at *URL of website*.

Example of an authored report/monograph:


Example of a report without an author or where the publishing organization is the author:

*Primary Care in New York City*. New York: United Hospital Fund, 2011.

Example of background materials prepared for a sponsored meeting:


**Survey and Poll Results Reports**

Name of author(s) or editors(s). *Title of Survey Report*. Place of publication: Publisher, year of publication. Available at *URL of website*.

Example of a survey/poll results report:


**Tools and Training Materials**

Category includes the following used to instruct or deliver educational content:

- **Evaluation Tools**—documents giving instructions or guidance about how to do evaluations or promote their findings
- **Toolkits, Toolboxes, Guides, and Training Materials**—for use by those in the field doing similar work; includes “how to” videos and training or educational software and curricula

Do not include class materials or training class satisfaction surveys.

**Evaluation Tools**

*Title of the tool* (type of tool). Place created: Organization producing the material, Date created. Available at *URL of website*.

Example of evaluation tool:

Toolkits, Toolboxes, Guides, and Training Materials

*Title of the toolkit, toolbox, guide, or training material* (type of product). Place created: Organization producing the material, Date created. Available at *URL of website*.

Example of toolkit or toolbox:


Example of training software:


Example of curricula:

*Palliative Care for Registered Nurses* (curricula for 3rd year). San Francisco: University of California, Fall 2012. Available at [www.ucsf.edu/palliative.3/html](http://www.ucsf.edu/palliative.3/html).