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## 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.

If you are contemplating any changes in project scope or objectives from those in your proposal, 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](#).)

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. 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 program financial analyst 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. Material in your Final Narrative Report may be made publically available by the Foundation so that others can benefit from a record of your experiences and what you have learned.

The Bibliography is part of your Final Narrative Report. It is a comprehensive catalog of publicly available products your organization (or subcontractors) produced throughout the life of your project. (Instructions for filing a bibliography, including categories of entries and entry formats, are in the [Bibliography Creation and Formatting](#) section of this document.)

# Grantee Reporting Instructions

## *Introduction*

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

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

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, marked with the grant ID to [grantreports@rwjf.org](mailto:grantreports@rwjf.org). The information will be retained in our record of the grant and forwarded to your program officer.

For questions about your reporting requirements, please contact your program financial analyst.

# Grantee Reporting Instructions

## *Annual Narrative Report*

### ANNUAL NARRATIVE REPORT

#### *Overview and Purpose*

We have devised a set of seven questions to guide you in providing the content we require in an Annual Narrative Report.

- Questions 1–6 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, as well as 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 7 asks you to submit grant products electronically to RWJF at [grantreports@rwjf.org](mailto:grantreports@rwjf.org) as soon as they are complete. See the *Electronic Submission Standards*. We do not want your Bibliography until you submit it as part of your Final Narrative Report. See the *Bibliography Creation and Formatting* section of this document.

#### *Format*

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

# Grantee Reporting Instructions

## *Annual Narrative Report*

- The five-digit RWJF grant ID
- The dates covered in the report
- The total amount of the grant
- The goal of the project as described in the proposal

### ***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 field of the email
- Attach an electronic copy of the Annual Narrative Report to the email
- Name your Annual Narrative Report according to the report naming conventions in the [Electronic Submission Standards](#)

Your program financial analyst 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.

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? Did you use indicators or benchmarks to determine your progress?** Briefly describe the activities carried out this reporting period to meet the goals, as described in your proposal. Briefly describe indicators or benchmarks used and progress to date. If you worked with any subcontractors, please indicate who they are and what they did for the project. If they produced products, make sure to send them to [grantreports@rwjf.org](mailto:grantreports@rwjf.org).
  - **If you conducted a review of the literature** to help direct your project, briefly summarize the information in the subject area you researched.
  - **For a service project**, indicate the number of people served during the year and being served currently, 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.

# Grantee Reporting Instructions

## Annual Narrative Report

- **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.
- **For a project engaged in advocacy around policy change**, describe the activities in this time period and their accomplishments to date.

For all grantees 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>.

### 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.
- Fully disclose all methodological information about the research as required by AAPOR standards. See the checklist at <http://www.aapor.org/Education-Resources/For-Researchers/Poll-Survey-FAQ/Opt-In-Surveys-and-Margin-of-Error.aspx>.
- 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 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

# Grantee Reporting Instructions

## *Annual Narrative Report*

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

# Grantee Reporting Instructions

## *Annual Narrative Report*

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 grantees 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 non-lobbying 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 project is part of a national program that 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. **Do you have any stories that capture the impact of this project?** If so, please share one to two. Examples of what we are interested in include stories of people/communities that the project has helped; lives that have changed; work that led to policy change, such as legislation or regulation; and research breakthroughs. You may include the stories as an appendix.
3. **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.

# Grantee Reporting Instructions

## Annual Narrative Report

- 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?
4. **Did RWJF assist or hinder your work in any way during this time period?** For example:
- Have RWJF's instructions and messages been consistent or have you gotten different messages from different RWJF staff (e.g., communications and program, or program and financial)?
  - Has RWJF helped you develop relationships with other grantees, programs, centers, or institutions working toward RWJF's strategic objectives?
  - Has RWJF provided technical assistance or directed you to useful technical assistance?
5. **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?
6. **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.
7. **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 the [\*Electronic Submission Standards\*](#) for instructions.

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](mailto:grantreports@rwjf.org). Please note that copies of testimony that are not accompanied by a completed *Testimony Coversheet* will be rejected.

If your project received print or internet coverage during the time period covered by the Annual Narrative Report, see the [\*Electronic Submission Standards\*](#) for instructions.



# Grantee Reporting Instructions

## *Final Narrative Report*

### 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.
- **If your grant was ONLY for the purpose of holding a meeting, conference, or workshop:**
  - Provide a Cover Page with the grant ID and the term and amount of the grant, the title of the meeting, and where and when it was held, followed by the meeting agenda.
  - Next, in a paragraph, tell us how many people attended and the kinds of organizations they represented. Then describe any activities deriving from or results achieved from the conference. These could include recommendations that have been taken up by another organization, formation of a workgroup on the issue the conference addressed, further research or policy activity, or receiving funding for a project derived from the conference.
  - Follow the rules for submission of products (e.g., background materials, proceedings) in the **Electronic Submission Standards**. You do not have to answer the questions in the next section.
- **If your grant was ONLY for immediate disaster relief:**
  - Send us a letter that provides the grant ID, the term and amount of the grant, a paragraph on how your organization spent the funds from the grant, and a brief description of the overall results of the disaster relief to which RWJF contributed, such as how many people were helped or what the organization was able to accomplish. Include the URL for your most recent annual report. You do not have to answer the questions in the next section.
- **For all other grants**, the Final Narrative Report instructions asks nine 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 but excluding the page count of the Bibliography. The preferred length is five to seven pages.
- Use a 12-point font, one-inch margins, and single line spacing.
- Incorporate the nine questions as bold italic subheads.
- Do not include appendixes, attachments, or exhibits in your report except as noted below.

# Grantee Reporting Instructions

## *Final Narrative Report*

- If you have created a Bibliography, include it at the end of the Final Narrative Report.
- Send the report as a PDF file.

### ***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 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.
- Head it "Final Narrative Report" or "Final Narrative Report With Bibliography" 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
  - The goal of the project as described in the proposal

### ***Bibliography***

The Bibliography to be submitted as part of your Final Narrative Report is a record of certain kinds of products available to the public (e.g., books, journal articles, reports, brochures, websites), 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 at the end of your Final Narrative Report. See the [Bibliography Formatting and Submission](#) section of this document for more information.

### ***Submitting Final Narrative Reports with and without Bibliographies***

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

Attach an electronic copy of the Final Narrative Report with or without its Bibliography to your email.

Put the grant ID in the subject line of your email followed by the words "Report" or "Report With Bibliography."

# Grantee Reporting Instructions

## *Final Narrative Report*

Name your Final Narrative Report with or without Bibliography according to the naming conventions in the *Electronic Submission Standards*.

Your program financial analyst will be notified that your Final Narrative Report has arrived at the Foundation and will distribute it 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 (with or without a 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 goals did you set for this project; and how well do you think the project met these goals? Do you have measures of your performance?** Briefly describe what the project 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. If you worked with any subcontractors, please indicate who they are and what they did for the project. If they produced products, send them to [grantreports@rwjf.org](mailto:grantreports@rwjf.org).

Do not report on activities paid for by other funders or by membership dues, unless you need to do so in order for us to understand the project; in that case make it clear that RWJF did not pay for these activities.

Cover the areas described below that are applicable to your project:

- **If you worked in partnership, 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.
- **If you conducted a review of the literature** to help direct your project, describe key findings and how they were used.
- **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.
- **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

# Grantee Reporting Instructions

## Final Narrative Report

the public sector. If a website 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.
- **For a project 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 grantees 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>.

### 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.
- Fully disclose all methodological information about the research as required by AAPOR standards. See the checklist at <http://www.aapor.org/Standards-Ethics/AAPOR-Code-of-Ethics.aspx>.
- 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

# Grantee Reporting Instructions

## *Final Narrative Report*

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

# Grantee Reporting Instructions

## *Final Narrative Report*

### **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 grantees 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 project is part of a national program that 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 contact your assigned RWJF program officer.

2. **Do you have any stories that capture the impact of this project?** If so, please share one to two. Examples of what we are interested in include stories of people/communities that the project has

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## *Final Narrative Report*

helped; lives that have changed; work that led to policy change, such as legislation or regulation; and research breakthroughs. You may include the stories as an appendix.

**3. Did RWJF assist or hinder your work on the project 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 program, or program and financial)?
- Did RWJF help you develop relationships with other grantees, programs, centers, or institutions working in your area of interest?
- Has RWJF provided technical assistance or directed you to useful technical assistance?
- Has RWJF helped you with sustaining or spreading the work after funding ends? If so, what type of assistance did RWJF provide?

**4. 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?
- Did RWJF assist you in meeting the challenge? In what way could RWJF have assisted you?

**5. 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 and which funders contributed to it.
- 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, just describe the nature of the support.
- 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.

**6. 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

# Grantee Reporting Instructions

## *Final Narrative Report*

- 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 are some effective ways to sustain or spread a project’s work after RWJF funding ends?

7. **What impact do you think the project has had to date? Who from outside the project could be called on to comment on it?** 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 public policy? How?
- Has it informed the work of other professionals or organizations? How?
- Has it informed the work of other researchers? How?
- Has it changed an institution so that it is better able to fulfill its mission? How?

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

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

8. **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



# Grantee Reporting Instructions

## Final Narrative Report

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 email any such news, marked with the grant ID, to [grantreports@rwjf.org](mailto:grantreports@rwjf.org). The information will become part of the record of your grant and automatically be forwarded to your program officer.

9. **With a perspective on the entire project, what were its most effective communications and advocacy approaches?** 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, websites) 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 include a Bibliography at the end of your Final Narrative 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 for instructions on creating a 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](mailto:grantreports@rwjf.org). Please note that copies of testimony that are not accompanied by a completed *Testimony Coversheet* will be rejected.
  - If your project received print or internet coverage during the final year of the project (or the time period since the last Annual Narrative Report), follow the instructions in the [\*\*Electronic Submission Standards\*\*](#) for submitting it.

# Grantee Reporting Instructions

## *Final Narrative Report*

If, after the grant is closed, an article, report, or book is published, the project receives radio or television or other national media coverage, or there are other significant communications activities, please send them to [grantreports@rwjf.org](mailto:grantreports@rwjf.org) following the instructions in the *Electronic Submission Standards*. If you need to send physical copies of products, follow the instructions in the *Electronic Submission Standards*.

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

### **BIBLIOGRAPHY CREATION AND FORMATTING**

#### ***Overview and Purpose***

If your grant has resulted in products in any of the bibliography categories listed below, please include a Bibliography at the end of 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.
- Include in your Bibliography only those materials that your staff or subcontractors have created that report on the results, findings, recommendations, and conclusions from your project/program.
- There are products not included in the Bibliography, such as coverage and data tapes, that we do want you to send RWJF as soon as they are available. See the [Electronic Submission Standards](#) document.
- If you find, when completing your Final Narrative Report's 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 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.
- Eliminate the uppercase "The" in the titles of newspapers and journals, as in *New York Times*, *Journal of the American Medical Association*.
- 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.

# Grantee Reporting Instructions

## Bibliography Creation and Formatting

- 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](http://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 and DOIs.
- Include only products produced by the grantee organization or program/project 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:

Brown PE. “Why Health Reform Is Necessary” (op. ed.). *New York Times*. A23, Nov. 18, 2008.

Or

# Grantee Reporting Instructions

## Bibliography Creation and Formatting

Thomms XA. “What’s Next for the Health Care System” (commentary). *Journal of the American Medical Association*. 3(89): 66–67. Available at [www.jama.org/2008.3/commentary](http://www.jama.org/2008.3/commentary).

### Journal Articles

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:

Adams LA, Mitchell E, Pierce HJ. “Health Policy and Access to Medical Care.” *Journal of the American Medical Association*. 277(8): 215–233, 2010. Available at [www.jama.org/277.8/2010](http://www.jama.org/277.8/2010).

Example of an article published in a supplement:

Plummer SS, Vogel G, Freemont N. “Medical Technology Is Not the Cure.” *Health Affairs*. 43(Suppl. 9): S100–114, 2011.

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](http://www.rwjf.org/pr/65013id).

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, 2013.

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

Sendroff SM. “Hard of Hearing Elderly Present Special Challenges for Adult Day Care.” Submitted to the *American Journal of Public Health*.

Example of an article that has not been submitted and is unpublished.

Chouy G. “Inequality in our Hospitals.” Unpublished.

### Journal Supplements and 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

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

- “Teens and Smoking,” Orleans CT, 3–5.
- “Cessation Services for Teens,” Chaloupka F, 6–9.

### Non-Journal Articles

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:

Materson M. “Don’t Throw out the Baby With the Bath Water,” *Redbook*, 24–26, May 2010.

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:

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 Academies Press. In press, 2012.

Example of an unpublished book:

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

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

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 program/project:

Altman SH, Reinhardt UE, 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," Altman SH, Reinhardt UE, Shields AE.
- Chapter 2. "Uninsured in America: The Causes and Consequences," Rowland D, Feder J, Keenan PS.

## 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:

Ginzberg E. "Summing Up." In *The Regionalization of Personal Health Services*, Saward EW (ed). New York: Milbank Memorial Fund, 2008.

## Communications, Promotions, and Official Correspondence

Materials created to communicate the project or program'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 project or program
- **Documentaries**—such as shows produced for HBO, NPR, PBS, or as an independent film
- **Grantee Profiles**—articles or other write-ups about the project/program, an organization created for the project, or a person engaged in or helped by the project for the purpose of promoting the project
- **Grantee Websites**—a new website for the project/program or pages on a grantee website devoted to the project
- **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)

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

- **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 project/program 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:

“Here Is Your Brain on Drugs,” first appeared in *New York Times*, March 11, 2002. Also appeared in *Wall Street Journal*, Nov. 19, 2002, and video version on *CBS Evening News*, April 2, 2002.

### **Blogs**

Organization creating the blog. “Title of 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.” Posted May 2, 2009.  
*www.sustainablesacramento.org/greenandcleanblog.*

### **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:

“Feasting on Fat: Why Children in America Are Obese,” directed by William Plummer. First aired at the Independent Filmmakers Forum, New York: March 15, 2009.

### **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 Reporting Instructions

## *Bibliography Creation and Formatting*

*How Francesca Andrulic and Her Community Conquered Asthma.* Created by the Allies Against Asthma program. Washington: Asthma Association of America, April 2007. Available at [www.asthmaassociation.org/stories/Andrulic](http://www.asthmaassociation.org/stories/Andrulic).

### Grantee Websites

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

Example of a project/program website:

[www.painpolicy.wisc.edu](http://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](http://www.facebook.com/eastbay), 30,549 views as of June 2014.

For a video created by the project 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=eoFFg0W9UME>, 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.

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

### 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:

“National Survey of Chronically Ill Americans,” Harris Interactive, March–June 2007. Sent to ICPSR April 2002.

### Presentations, Proceedings, and Testimony

Category includes:

- **Presentations**—those 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:

Joan M. Teno, “Measuring Quality of Care for Persons Diagnosed With Life-Limiting Illness,” (keynote) presented at the Annual Meeting of the Gerontology Society, June 9, 2007, Corvallis, OR. Presentation available as part of proceedings at [www.geron.org/reports/conf 2007](http://www.geron.org/reports/conf 2007).

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

### Proceedings

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

“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 [URL of website](#).

Example of a proceeding from 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.commnet.org/meetings/july-2008](http://www.commnet.org/meetings/july-2008).

### Testimony

Only include testimony by project 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:

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

### 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 project or program
- **Issue, Policy, and Research Briefs**—issue briefs, policy briefs, legislative scans or reports, policy synthesis, and research highlights

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

- **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:

Harrison A, Lutman I, Patrizi P. *St. Louis, Missouri's Drug Court for Juvenile Offenders*. Philadelphia: Public/Private Ventures, 2009. Available at [www.ppv.org/reports](http://www.ppv.org/reports).

### **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:

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

Example of a map:

*Health Insurance Coverage in Kentucky Counties*. Lexington, KY: Southern Institute, 2011.

### **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:

McLaughlin M, London R. *Evaluating the Implementation of Playworks in Eight San Francisco and Silicon Valley Schools*. Palo Alto, CA: John W. Gardner Center for Youth and Their Communities, 2011.

### **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:

*Poverty Rates in Northeast Cities*, 2008. Washington: Urban Institute, June 2010.

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

### 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):

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

### Reports

If the executive summary was published separately, list the URL for it separately.

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:

Anders R, Gerbman F, Howe D. *Quality Assurance in Health Care Today*. Washington: Brookings Institution, 2010. Available at *www.brookings.org/qualityassurance.html.*

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:

*Trends in Insurance Cost, 1980–2005* (background paper). AcademyHealth Insurance Conference. April 30, 2010. Washington.

### 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:

*Americans' View of Quality Measures*. New York: Louis Harris and Associates, 2010.

### 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.

# Grantee Reporting Instructions

## *Bibliography Creation and Formatting*

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:

*Everything a Qualitative Health Researcher Needs to Know* (evaluation tool). Washington; AcademyHealth, 2010.

### **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:

*Community Tool Box* (vol. 1–2). Kansas City, MO: Kansas Health Foundation, 2008. Available at <http://ctb.ku.edu>.

Example of training software:

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

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).