

National Program Management Summative Reporting Instructions



Robert Wood Johnson Foundation

SUMMATIVE PROGRAM REPORT—OVERVIEW AND PURPOSE

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

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

RWJF will request that the program manager file a Summative Program Report when the national program is coming up for reauthorization or it is the last year of the national program.

- The Summative Program Report does not replace the Narrative Report for the last year of the program.
- When you write your Summative Program Report, include all activities and accomplishments of the entire program to date.
- The Summative Program Report format consists of 10 questions and is designed to provide essential information about the results, findings and lessons from your national program.
- Support your answers with quantitative data, where they are available and appropriate; provide other supportive evidence where requested.
- Use *None* and *Not applicable* where appropriate.

FORMAT

- The maximum length of the Summative Program Report is 50 pages, including any charts and tables. Feel free, however, to submit shorter reports.
- Use a 12-point font, one-inch margins and single-line spacing.
- Incorporate the 10 questions as bold italic subheads.

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COVER PAGE

- Do not send a cover letter.
- Prepare the cover page of your report on an electronic version of your institution's or organization's letterhead.
- If you do not have an electronic version, enter your organization's name, address, phone, fax and e-mail in the top left-hand corner.
- Date the page.
- Head it **SUMMATIVE PROGRAM REPORT** followed by:
 - the title of the program;
 - the date the program began and the date it will be ending;
 - the five-digit RWJF grant ID# of the current or last TAD grant;
 - the total funding for the national program listed in the call for proposals; and
 - the goal of the program.

BIBLIOGRAPHY

The Bibliography submitted with your Summative Program Report is a comprehensive catalog of the products throughout the program (e.g., books, journal articles, reports, brochures, Web sites), national/regional events (e.g., conferences and workshops), and published presentations and testimony to government bodies. It is a separate report from the Summative Report. Please follow the [Bibliography Instructions](#) in the Instructions section of rwjf.org (Grants/Grantee Resources/Reporting Information/Instructions).

SUBMITTING THE SUMMATIVE REPORT AND BIBLIOGRAPHY

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

- An e-mail attached to which is the Summative Report.
- Put the ID# of the final grant into the subject line of your e-mail followed by *Summative Report* or *Summative Report* and *Bibliography* you are filing both.
- Name your report according to the report naming conventions described in [RWJF Electronic Submission Standards](#).

Your grants administrator will be notified that your Summative Program Report and Bibliography has arrived and will distribute it within RWJF.

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SUMMATIVE PROGRAM REPORT – QUESTIONS

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

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

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

4. **If there were project/site 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 program managers with similar arrangements.

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

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

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

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

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7. **What impact do you think the program has had to date? Who can be contacted a few years from now to follow up on the program?** Describe what you believe to be the impact of the program, providing evidence for all statements (e.g., publication in major journals, citations of the program or its sites/projects/trainees' work in literature, major press coverage, adoption of the model by other organizations, changes in policy, professional practice or behavior). For example:
- Has the program contributed in some significant way to general knowledge about a subject? Or a change in conventional wisdom?
 - Has it informed the work of other professionals or organizations?
 - Has it informed the work of other researchers?
 - Has it informed public policy?
 - Has it increased access to information for any other important segment of the public (e.g., patients and their families, journalists, specific groups of policy-makers)?
 - Has it created a new model for delivering services or conducting research, and if so, has this model been widely adopted?
 - Has it changed institutions so that they can fulfill their missions?

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

8. **Who served on your final national advisory committee?** Provide a list of members, or if they are listed on your Web site, provide the URL for that page.
9. **If the program is in its final year, what are the post-program plans?** Include a description of the following that are applicable:
- changes in operations and scope in any individual projects/sites that are continuing;
 - replication or use of findings;
 - names of other institutions that projects or sites expect to involve;
 - plans to support the program financially, including grants the NPO or projects/sites are seeking and/or a business plan to become self-supporting;
 - evaluation of the impact of a matching funds requirement on the ability to obtain financial support for its continued operation as the national program ends;
 - communications plans (e.g., articles, reports or books, or if the program expects media coverage).

RWJF has an ongoing interest in the long-term effects and accomplishments of each national program and welcomes updates on the continuation, dissemination or replication of each program's work after the NPO is closed. Please send any such news to grantreports@rwjf.org, the Grant Results Reporting Unit in RWJF's Communications Office, along with two copies of any relevant material marked with the RWJF grant ID# and the name of the program.

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

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

The Bibliography is a separate document.

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 *RWJF Electronic Submission Standards*. Put the ID# of the final TAD grant in the subject line of the e-mail followed by the word *Product*.

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