

THE COMMONWEALTH FUND

Guidelines for Interim Narrative Reports

Note: Depending on the nature of the project being funded, grantees may be asked to provide reports which differ from the general guidelines presented below. Please consult your Fund Program Officer prior to preparing any reports.

Interim Narrative Reports should not exceed 5 pages of text. Please note that in the Payment Schedule and Reporting Requirements (P&R), the Fund has outlined specific items you should submit with narrative reports and you can refer to it while preparing this report. If you are required to submit any products, such as survey instruments or papers, you can include them as attachments. In any case, **please follow this format.**

Title Page

Please include the following information on the front page of your report: name of the project; the dates of the project period covered by this report; the number of this report (e.g. - 1 of 3, 2 of 3, etc.); and the name, address, phone number, and email address of the Principal Investigator(s).

Report Sections

- I. **Background (up to 1 page)** -Restate the goals and objectives of your project and describe what your work is trying to achieve. If you feel your original goals and objectives need to be revised, note this here and then discuss the reasons for the proposed changes in Section III (Accomplishments and Challenges). As a backdrop for the new information included in the next sections, briefly summarize the accomplishments and challenges you described in earlier reports.
- II. **Project Implementation and Administration (up to 1 page)** - Describe the major administrative and day-to-day activities of the project during this reporting period. These could include: hiring of staff, identification of consultants, recruitment of patients or research subjects, inception of a proposed intervention, and establishment of databases.
- III. **Accomplishments and Challenges (1-2 pages)** - This is the most important section of the report and should account for a significant portion of the narrative. First, if your goals, objectives or activities need to change from what was originally proposed and approved, please begin by describing the proposed revisions and discussing the reasons for these changes.

Next, focus on the programmatic progress you are making. Please refer to the P&R document which includes the particular activities or deliverables expected from your project in this section. There may be additional items you will wish to describe as well.

While your accomplishments are important, it is equally important that you tell us about challenges you are facing and how you plan to address them. These may include: obstacles to implementation; changes to your protocol or plan; activities originally proposed that can not be undertaken; and any internal and/or external

problems. *We have chosen to fund inventive and potentially useful projects. Challenges are inherent to the nature of projects that strive to change a system, test a new model, or explore a new area of inquiry.* Sharing the difficulties you are facing gives us the chance to help if possible. It also helps us to learn from your experience so we can share with other grantees potential problems they may face.

Specific examples of possible challenges include, but are not limited to: unexpected staffing changes, low recruitment rates, delays in setting up services, new regulations, changes in reimbursement, facility mergers, changes in the community that you are working in, or the appearance of a new technology in the field that may affect the issue you are addressing.

- IV. **Plan for the Next Reporting Period (up to 1 page)** - Outline the major tasks that will be undertaken during the next phase of the project. If you wish, this section may be formatted as a timeline or workplan, but should contain sufficient detail to keep us apprised of your plans and progress.
- V. **Analysis and Interpretation (up to 1 page)** – In this section, please reflect not only on the project’s results but also on the work itself – what does all of what you are doing mean? In addition to specific activities and products, we are interested in learning how your work is having an impact. Please comment on how this work fits into the field. Is it helping to create positive changes in policy or practice? Have others expressed interest in the project and its results? We are also interested in learning if this project is having an impact on either your professional development or your organization. Have you been asked to speak about this project? Has this project led to other opportunities to work in this area, either for yourself or your organization?

Attachments

Any documents to be shared with us can be added as attachments. Examples of items which should be included are:

- **All deliverables noted for this reporting period as specified in the Payment Schedule and Reporting Requirements.**
- Copies of reports from any consultants or advisors where applicable.
- Abstracts from presentations made to professional groups or associations.
- Copies of drafts of instruments, data dictionaries, educational materials, manuals or other project deliverables.
- Charts, tables, graphs, or other summaries of preliminary data.
- Bibliographies or reference lists.
- Other documents or materials as appropriate