

Call for Applications: Learning Event Support



Supporting Wisconsin-based learning events that build knowledge, skills, networks, and impactful next steps beyond the day of the event among multi-sector professionals working to advance health through research, education, and community health improvement efforts statewide

APPLICATIONS DUE

Applications accepted on a rolling basis, while funds are available



MEDICAL SCHOOL



ADVANCING A HEALTHIER
WISCONSIN ENDOWMENT

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Application Checklist

- ☒ Review the RFA and confirm intent, commitment, and eligibility for funding
- ☒ Discuss the proposed learning event, funding eligibility, and application process with AHW Program Manager
- ☒ **Complete application form and submit for review**
- ☒ Discuss submitted application with AHW Program Manager and address any requested revisions throughout review process (if needed)

Note: **BOLD** items are required

Overview

At the Advancing a Healthier Wisconsin Endowment (AHW), we are driven by a vision for a healthier Wisconsin.

As a statewide health improvement philanthropy, we seek to propel the most promising work and ideas for a healthier Wisconsin today, and for generations to come. We do that by *investing* in high-impact, promising work; *connecting* people, research, and academic medicine to break down silos and build up relationships across sectors and communities; and *influencing* how ideas and knowledge can become action to inform programs, policies, and practices.

We focus our work to advance three health priorities in Wisconsin, seeking solutions and new knowledge to improve heart health, support healthy minds, and dismantle cancer. Alongside these issues, we aim to accelerate innovation, collaboration, and impact by responding to research- and community-identified needs. (Learn more about [our story](#), [how we work](#), and [our focus areas](#).)

Funding Summary

AHW's Call for Applications for Learning Event Support invests in Wisconsin-based learning events that build knowledge, skills, networks, and impactful next steps beyond the day of the event among multi-sector professionals working to advance health through research, education, and community health improvement efforts statewide. This opportunity is open to Wisconsin-based nonprofit or governmental organizations and Medical College of Wisconsin-based entities hosting eligible learning events.

Key Dates (Recommended)

Approximately 90 days prior to event

Discuss proposed learning event with AHW Program Manager

Approximately 60 days prior to event

Submit application for funding determination

Prior to date of event (*pending approval of funding*)

Complete required administrative financial compliance paperwork

Call for Applications: Learning Event Support

Funding Details

AHW's Call for Applications for Learning Event Support intends to support Wisconsin-based learning events that build knowledge, skills, networks, and impactful next steps beyond the day of the event among multi-sector professionals working to advance health through research, education, and community health improvement efforts statewide. Funding is available to support up to 20 events—10 led by nonprofit or governmental (community) organizations and 10 led by Medical College of Wisconsin (MCW) School of Medicine-based entities. Applications will be considered on a rolling basis through June 30, 2020, or until available funds have been distributed.

Description

Opportunities for continuous learning and workforce development are essential to providing ongoing support for Wisconsin's multi-sector professionals working to positively impact the health of residents across the state. Learning events aimed at convening participants to build knowledge, skills, and networks to improve health and that support participants to turn their knowledge into action after the learning event are key to advancing our collective understanding of and ability to address Wisconsin's leading health issues.

AHW values partners across the state who are leading efforts to plan, organize, implement, and evaluate learning events and conducting ongoing efforts post-event to support participants to sustain the impact of the learning event. Learning events must align with [AHW's Education and Workforce Development pathway](#) by supporting Wisconsin-based community organizations and MCW-based entities providing learning opportunities for the health research, health care, and community health improvement workforce. Through this pathway, AHW will support efforts that develop and grow a current and future workforce in these fields that is increasingly more:

- Accessible by being in the right place at the right time,
- Equipped with the right skills, knowledge, technology, data, networks, and resources, and
- Representative of the diversity of the community being served

Eligibility

Financial support is available for learning events that meet the following eligibility criteria:

- Demonstrate a clear connection to advancing health in Wisconsin and align with one of more elements of AHW's framework and focus areas
- Engage learning event participants, in which a majority of participants are current professionals, early career professionals, and/or the next generation of leaders working to improve Wisconsin's health
- Build participant capacity, such as knowledge, skills, or networks, through defined learning objectives and employing best practices in adult learning

- Support participants to turn knowledge gained into action after the learning event to sustain the impact of the learning event
- Are conducted in Wisconsin with most participants living and working in Wisconsin
- Are informed by multiple organizations or entities and demonstrate that the learning event engages participants from multiple sectors or disciplines
- Clearly demonstrate what is new or innovative compared to other events or prior iterations of existing events
- Demonstrate that additional funds from AHW are needed to support the learning event beyond any leveraged funds or participant registration fees
- Are hosted by an eligible community organization or MCW-based entity:

Nonprofit or Governmental (Community) Event Host Organization Eligibility	MCW-Based Event Host Eligibility
Wisconsin-based, nonprofit, IRS tax exempt 501(c)3 or governmental organization with an EIN number	MCW School of Medicine-based entity with an eligible full-time or full-professional effort status MCW faculty member with a primary appointment in the MCW School of Medicine as part of the event host team

Budget Requirements

Each eligible learning event may request up to \$5,000 in funding to support direct event-specific expenses aligned with the allowable expenses and funding restrictions detailed below. Event support awards are limited to one per eligible community organization or MCW-based entity per fiscal year.

For information on financial compliance requirements for funded projects, please see the Funded Project Compliance Overview section of this RFA.

Supplanting Criteria

AHW was established by MCW as the result of a generous financial gift made by Blue Cross Blue Shield of Wisconsin to the people of Wisconsin, giving AHW the extraordinary responsibility to steward this financial gift on behalf of Wisconsin residents. As such, AHW adheres to requirements as defined in a March 28, 2000 Order of the Commissioner of Insurance which requires that AHW funds (the Funds) “may not be used to supplant funds or resources otherwise available.” AHW, via MCW, must report annually on its determination that the Funds do not supplant other resources that may be available to accomplish the same purposes.

https://ahwendowment.org/AHW1/HWPPDocumentsForms/SupplantingCriteria_4.2.19.pdf

Prior to recommending funding, the MCW Controller’s Office, on behalf of AHW’s governance bodies the MCW Consortium on Public and Community Health (Consortium) and AHW Research and Education Advisory Committee (REAC), will assess whether other financial resources exist or are available for the project, including an assessment of whether the applicant has other financial resources available for the learning event. Applicants must certify that no financial resources will be supplanted and provide a complete listing of current funding sources for the learning event or other similar learning events.

Leveraging

All applicants are highly encouraged to leverage additional funding to support the full costs of the learning event. Leveraging additional support not only demonstrates additional commitment to the learning event, but also increases sustainability of efforts and can provide resources for activities that AHW cannot fund.

Leveraging can include a cash match from one or more other funders, business partners, coalition member organizations, or government (city, county, state, or federal) funds as well as in-kind support provided by participating organizations.

Allowable Expenses & Funding Restrictions

Funds can only be used for direct project-specific expenses, which include the following for this RFA opportunity:

- Meeting expenses, including but not limited to venue, A/V, and refreshment costs. Please note that refreshment costs can only account for up to 10% of the total AHW funding request in support of the learning event.
- Consultant/speaker fees and associated travel, including honorariums/speaker fees and speaker travel expenses to and from the learning event, including but not limited to airfare, mileage, taxi/public transportation, hotel, parking, etc.
- Supplies, including printing and appropriate meeting supplies needed to conduct the learning event.
- Other direct project-specific expenses, pending sufficient justification and AHW approval prior to incurring the cost.

Funds may not be used for:

- Personnel time (salary and fringe)
- Learning events conducted outside of Wisconsin
- Learning events that include political campaigns, lobbying activities, or voter registration drives, and events that are primarily focused on marketing, fundraising, networking, or research/information gathering
- For the purchase of alcoholic beverages or to support events at which the host is providing alcoholic beverages
- Learning events that are directly related to or funded through a current, active AHW-funded project
- Indirect costs such as ongoing operating expenses of an organization's routine functions and principal programs or attendee scholarships or stipends
- Capital expenditures costing \$3,000 or more with a useful life of more than one year
- Debt reduction
- Entertainment
- Lobbying (*see Legal Compliance section for additional details*)
- Reimbursement solely for patient care or clinical service delivery
- Publishing fees to benefit education or research in general
- Supplanting

View a complete list of [Allowable and Unallowable Costs](#) on the AHW website.

Application and Review Process

Eligible applicants are invited to complete the application for learning event support. The application can be downloaded from the AHW website and submitted via email to Tracy Wilson at trwilson@mcw.edu. Applications

are accepted on a rolling basis through June 30, 2020 and are reviewed on a first come, first serve basis until available funds have been distributed.

All submitted applications will undergo technical and programmatic review by AHW staff to ensure that the application is aligned with the funding opportunity as approved by the Consortium and REAC, and that all eligibility requirements and funding criteria have been met. Applications that pass technical and programmatic review will then undergo review by the MCW Controller's Office to confirm that the requested funds are not supplanting existing funds or funds available through other sources. Applications that pass supplanting review will be eligible for approval for funding.

At each step of the process, applicants can expect regular updates from AHW staff regarding the status of the application as well as any questions and comments that require clarification before the application can advance to the next step in the review process.

Application Resources

AHW funding is highly competitive. Our goal is to support applicants through the application process to the best of our abilities, and we encourage applicants to contact AHW staff with questions throughout the application process.

AHW Program Manager Consultation

For an efficient application process, eligible applicants are highly encouraged to contact the AHW Program Manager as early as possible in their event planning process to help ensure that the event aligns with the funding opportunity and all funding criteria are met. **Contact Tracy Wilson at trwilson@mcw.edu or (414) 955-4364 to discuss your learning event.**

AHW Online Resources

AHW's website provides information, application resources, and answers to frequently asked questions related to each application and the AHW funding process. Visit the AHW website at www.AHWendowment.org.

Funded Project Compliance Overview

The following information briefly highlights the process and requirements for learning events that are successfully awarded funding through the Call for Applications for Learning Event Support from the Advancing a Healthier Wisconsin Endowment.

Reporting Requirements

The learning event host organization receiving funds will be required to report the outcomes of the investment through the following mechanisms:

- Event Outcomes Report – Within two months following the event, the event host will be required to complete a report template to share immediate outcomes of the event, including:
 - Description of the event proceedings, including key speakers, highlights, and featured content

- Attendee information, such as number of attendees and types of sectors/disciplines and geographic locations represented
- Participant-reported learnings based on the learning objectives in the approved application and intention to apply learnings to their work
- Post-Event Outcomes Report – Within six months of the event, the learning event host will be required to share how they supported event participants to move their learnings into action to improve health after the initial learning event along with appropriate evaluation outcomes of the post-event support opportunity, including:
 - Description of the post-event support
 - Number of participants who accessed or engaged in the post-event support
 - Participant-reported continued learnings and efforts to apply and share their learnings to advance health in Wisconsin

Financial Compliance

Commitment Letter

Upon funding approval, the learning event host organization will be required to execute a Commitment Letter with the Medical College of Wisconsin (MCW), on behalf of AHW, before the learning event occurs. Only the learning event host organization should be listed on the Commitment Letter and only this entity will be able to directly invoice for approved AHW-supported learning event costs.

The Commitment Letter must be submitted to AHW and fully processed prior to the date of the learning event along with the following documents:

Nonprofit or Governmental (Community) Event Host Organization	MCW-Based Event Host
<ul style="list-style-type: none"> Commitment Letter (signed) Independent Contractor Template (signed) W9 with organization EIN 	<ul style="list-style-type: none"> Commitment Letter (including Department Administrator contact information and Department Chair signature)

Invoicing and Payment Processes

All invoicing must be complete within 60 days following the learning event and/or post-event support, depending on the approved AHW learning event costs. No expenses will be reimbursed that were incurred prior to the effective date of the Commitment Letter or subsequent to the end date unless specifically approved, in writing, by AHW. MCW/AHW reserves the right to request and review additional documentation for any payment requests submitted.

Nonprofit or Governmental (Community) Event Host Organization	MCW-Based Event Host
<ul style="list-style-type: none"> Project activities are funded through an expense-reimbursement process Payment requests must be submitted using the AHW-provided Invoice Form and may only include AHW-approved, 	<ul style="list-style-type: none"> Payment requests must be submitted via MCW Accounts Payable using the AHW-provided project number and may only include AHW-approved, direct, allowable,

<p>direct, allowable, event-specific costs incurred by the learning event host organization</p> <ul style="list-style-type: none"> • Invoices must be submitted to AHW with all support documentation and must align with the costs detailed in the approved application, unless otherwise approved 	<p>event-specific costs incurred by the learning event host organization</p> <ul style="list-style-type: none"> • Payment requests must be submitted with all support documentation and must align with the costs detailed in the approved application, unless otherwise approved
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Financial Conditions

The amount awarded is the maximum funding available from AHW for the learning event. MCW/AHW reserves the right to reduce unspent funding and/or funding duration, if needed, to comply with state and/or federal law (including but not limited to law governing endowment fund management), or to address financial constraints which negatively impact AHW.

Legal Compliance

Proposal Protection/Intellectual Property

Your proposal will be considered by AHW staff and governing boards through the review process.

AHW operates in accordance with standards consistent with Wisconsin's Open Meetings and Open Records Laws. Documents are generally considered by AHW governing bodies in open public meetings and become public record that may be subject to release. Prior to funding decisions being made, information contained in your application will not be shared outside the established RFA review process. If your project is funded, information contained in the application is subject to release. An Intellectual Property Agreement may be required for inventions, discoveries, or copyrightable material developed as a result of a project.

Lobbying

AHW funds may not be used for lobbying efforts. Successful applicants will ensure that descriptions of the intended use of all AHW funds abide by the nonlobbying requirement.

Lobbying includes communication with a legislator or agency official regarding a specific piece of legislation and your view on it, including any attempt to influence local, state, or federal legislation or administrative action. Advocacy is allowable and includes taking part in efforts to create or effect change in policies or systems, and can take many forms including education, media, etc.

Marketing & Publicity Requirements

Award Announcement

All announcements related to the award of AHW funds are embargoed (i.e. not for dissemination outside of project partners) until the date set by AHW. In most cases, AHW will prepare its own press release to publicize funding awards and/or announce awards on its own dissemination channels, which may include the AHW website, electronic newsletter, and/or additional avenues such as social media.

Press Releases and/or Media Opportunities

News releases regarding the receipt of your AHW funding award are embargoed until the date set by AHW. Subsequent news releases about your project's activities do not need to adhere to an embargo or be reviewed by AHW. Exceptions to this guideline include announcements or press releases related to major events, information releases, or other announcements in which you seek AHW's collaboration on the announcement. Please contact your AHW Program Manager with any questions.

If you are contacted by a reporter during the period of your award, AHW encourages you to share the news and impact of your work! If reporters have specific questions about AHW or why your project was funded, please direct those inquiries to AHW Communications at sdeering@mcw.edu or (414) 955-4753.

In learning event materials, press releases, and/or other media opportunities, acknowledge AHW as a contributing funder with the following clause:

"This [project, program, conference, research, report, etc. (choose one)] is funded [in part or wholly (choose one)] by the Advancing a Healthier Wisconsin Endowment."

Sample Application

Learning Event Support

Eligible Wisconsin-based nonprofit or governmental (community) organizations and MCW School of Medicine-based entities hosting eligible Wisconsin-based learning events are invited to submit the following application to apply for AHW's Learning Event Support funding. The application can be downloaded from the AHW website and submitted via email to Tracy Wilson at trwilson@mcw.edu. **Applications are accepted on a rolling basis through June 30, 2020, until available funds have been distributed.**

Learning Event Host Organization

Organization Name:

Organization Website:

Type of Organization:

☐ Nonprofit organization (check the applicable type below):

Attach a copy of your IRS nonprofit verification to this form (community organizations only).

- ☐ health, social service or other community-based organization
- ☐ faith-based organization
- ☐ private university or school
- ☐ other (specify):

OR

☐ Government organization (check the applicable type below):

- ☐ state or local government
- ☐ tribal organization
- ☐ public university or school
- ☐ other (specify):

Event Host/Coordinator Name:

Email Address:

Phone Number (including area code):

Supplanting Attestation

1. Would funding from AHW supplant or replace other funding that your organization already has for this learning event?
☐ NO ☐ YES – if YES, please describe:
2. Are there any projects that your organization has previously taken within the last three (3) years, or that your organization is currently doing, that are closely related to the proposed learning event, including previous iterations of a similar event?
☐ NO ☐ YES – if YES, please describe the previous project/learning event and what is new or innovative about the proposed learning event:
3. Would the proposed use of funds from AHW leverage or complement funds you previously or currently receive from other sources for this event, including participant registration fees?
☐ NO ☐ YES – if YES, please describe the source of other funds and why additional funds are needed from AHW to support the event:
4. Have you already applied to another funding source for financial support for the same or similar learning event?

☐ NO ☐ YES – if YES, please describe the result of that application or when you expect to receive notification:

5. Please provide any other relevant information:

By signing this form, you agree to perform responsibilities as described within this submission. Additionally, by signing this form, your organization attests to its eligibility and represents that the information provided in this submission is accurate, complete and current and the individual signing affirms that s/he has authority to execute this form on behalf of the organization. By signing, you acknowledge that the MCW Consortium on Public and Community Health and AHW Research and Education Advisory Committee are subject to Wisconsin Public Records laws and its records may be subject to release as required by law. The organization represents that the funding from the Advancing a Healthier Wisconsin Endowment will not supplant, and acknowledges that this information shall be relied upon by the Medical College of Wisconsin to discharge its legal and regulatory obligations with respect to the subject matter of this form.

Event Host/Coordinator Signature

Printed Name and Date

Organization Authorized Signature

Printed Name and Date

IF DIFFERENT FROM ABOVE *Electronic signatures are acceptable.*

Learning Event Information

Learning Event Title:

Date(s) of Event:

Venue Name:

Venue Address (include street address, city, state, and zip code):

Event Description – Describe of the purpose of the learning event and list the event’s learning objectives (2,000 characters, including spaces):

Primary Audience – Describe the primary multi-sector or multi-disciplinary audience that will attend the learning event and the anticipated number of participants (2,000 characters, including spaces):

Will this learning event be co-hosted? ☐ YES ☐ NO

If yes, list the co-hosts or collaborators (not including sponsors) of the learning event:

If no, describe how the learning event is informed by multiple organizations or entities:

Is this a new learning event? ☐ YES ☐ NO

If yes, describe what gap the learning event aims to fill (2,000 characters, including spaces):

If no, state how often the learning event is conducted and describe how the proposed event builds off previous iterations and what gaps still exist to be addressed by the proposed event (2,000 characters, including spaces):

AHW Five-Year Plan Emphasis Areas

AHW Focus Areas: AHW recognizes that the health issues threatening Wisconsin's residents and communities are complex, interrelated, and multi-faceted. While AHW supports partners in responding to emerging health needs and opportunities, the bulk of its portfolio is focused around three health areas.

Primary

Please select one (1) primary AHW focus area that the majority of the proposed learning event aims to impact:

☐ Improving Heart Health

Advancing cardiovascular health by seeking solutions across genetic and biologic factors, health behaviors and the socioeconomic conditions that lead to poor heart health outcomes

☐ Supporting Healthy Minds

Advancing brain and behavioral health by seeking solutions across brain conditions, diseases and injuries, as well as the emotions, behaviors and biology of mental wellness and substance use

☐ Dismantling Cancer

Advancing improvements in cancer by seeking solutions that improve understanding, prevention, and survival in the fight against cancer and its causes

☐ Other, please describe:

Secondary

If applicable, select all additional focus areas that the proposed learning event will impact:

☐ Improving Heart Health

☐ Supporting Healthy Minds

☐ Dismantling Cancer

☐ Other, please describe:

Please describe how the proposed learning event addresses each of the selected focus areas and specifically aims to advance health in Wisconsin: (2,000 characters, including spaces)

AHW Determinants of Health: AHW recognizes that determinants of health are the contributing and risk factors that lead to increased risk for disease, disability, and death within each focus area. While there are many different definitions of determinants of health, AHW is guided by three broad categories of determinants.

Primary

Please select one (1) primary AHW category of determinant that the majority of the proposed learning event aims to impact:

☐ Biological and genetic factors

Including areas such as: genetic makeup (chromosomal, single-gene); physical body structure (age, weight); and bodily function (blood pressure, biochemical function)

☐ Health behaviors and health care factors

Including areas such as: diet, physical activity, alcohol/tobacco and other drug use, sexual activity; policies that impact individual and population health; and health services, such as access to and quality of care

☐ Social, economic and environmental factors

Including areas such as: availability of resources to meet daily needs, such as living wage and healthy foods; social supports and interactions; public safety; exposure to toxic substances and physical hazards; social norms and attitudes, such as discrimination; exposure to crime, violence and social disorder; quality schools; and housing, homes and neighborhoods

Secondary

If applicable, select all additional categories of determinants that the proposed learning event will impact:

☐ Biological and genetic factors

☐ Health behaviors and health care factors

☐ Social, economic and environmental factors

Please describe how the proposed learning event addresses each of the selected determinant of health areas:
(2,000 characters, including spaces)

Narrative Questions

1. How will the learning event host(s) support participants to turn knowledge into action beyond the learning event? (4,000 characters, including spaces)
2. How will learning event host(s) evaluate participants' learning from the event and post-event support to demonstrate that event learning objectives were met and that participants were able to turn knowledge into action? (4,000 characters, including spaces)

Budget Request

AHW request amount (up to \$5,000 maximum):

What approximate portion of the total event cost and post-event costs is this request?

Please detail the specific, direct event and post-event costs that AHW funds would be used to support. If the proposed learning event is an iteration of an existing event, please describe how the identified costs are specific to supporting the new or innovative components of the proposed learning event. If appropriate, please attach the event budget.

Budget Category	AHW Requested Amount	Description of AHW Learning Event Costs
Meeting Expenses		

Including but not limited to venue, A/V, and refreshment costs. Refreshment costs can only account for up to 10% of the total AHW funding request		
Consultant/Speaker Fees and Travel Expenses Including honorariums/speaker fees and speaker travel expenses to the learning event, including but not limited to airfare, mileage, taxi/public transportation, hotel, parking, etc.		
Supplies Including printing and appropriate meeting supplies needed to conduct the learning event		
Other		
Total		



Changemaking for a Healthier Wisconsin