COMMUNITY-ACADEMIC PARTNERSHIP FUND
2012 REQUEST FOR PARTNERSHIPS

APPLICATION GUIDELINES

NOTICE OF INTENT/LETTER OF INTEREST
DUE JUNE 14, 2012

WISCONSIN PARTNERSHIP PROGRAM

University of Wisconsin
SCHOOL OF MEDICINE
AND PUBLIC HEALTH
PROGRAM OVERVIEW

KEY DATES
June 14, 2012 Notice of Intent/Letter of Interest due
September 6, 2012 Full application due
December 31, 2012 Notification of awards
April 1, 2013 Expected project start date

PURPOSE AND GRANT DESCRIPTION
The Wisconsin Partnership Program was created with funds from the conversion of Blue Cross & Blue Shield United of Wisconsin. The Wisconsin Partnership Program is dedicated to improving the health and well-being of the public through investments in research, education and evidence-based practices leading to environmental, institutional or policy change. The 2009–2014 Five-Year Plan, available at wphf.med.wisc.edu, guides the work of the Wisconsin Partnership Program.

Priority Areas:
- Programs aimed at eliminating health disparities.
- Programs that address the health needs of rural and urban underserved areas in Wisconsin.
- Programs targeted to promoting healthy weight, physical activity and good nutrition, and reducing the incidence and severity of overweight and obesity.

REVIEW CRITERIA
- Aligns with Wisconsin Partnership Program grant priorities.
- Aligns with Wisconsin Partnership Program mission, vision and guiding principles.
- Enhances existing or promising community and academic partnerships.
- Uses promising practices or evidence-based strategies.
- Aligns with the Wisconsin State Health Plan.

ELIGIBILITY
- Must be a Wisconsin-based organization.
- Must be a state, tribal or local governmental agency or a charitable organization that is tax-exempt under Section 501(c) (3) of the Internal Revenue Code.
- Must work with a UW System academic partner.

FUNDING CATEGORIES AND DURATION
Development Grant (6-page limit)
- Partnership development awards are up to $50,000 for 1 to 2 years.
- Pilot/feasibility awards are up to $50,000 for 1 to 2 years.

Implementation Grant (10-page limit)
- Small-scale implementation awards are up to $150,000 for 2 to 3 years.
- Implementation awards are up to $400,000 for 3 years.

Beginning with the 2012 funding cycle, only existing community-academic partnerships will be eligible for implementation grants. Although the preferred way of meeting this requirement is to complete a Wisconsin Partnership Program development grant, other demonstrated collaboration may be considered.

TECHNICAL ASSISTANCE/CONTACT INFORMATION
Mary Jo Knobloch, MPH, CPH
Program Officer
Wisconsin Partnership Program
knobloch2@wisc.edu
608-265-2284
wphf.med.wisc.edu
INTRODUCTION AND GENERAL INFORMATION

INTRODUCTION
The University of Wisconsin School of Medicine and Public Health Oversight and Advisory Committee (OAC) is pleased to announce the availability of the 2012 Community-Academic Partnership Fund grants through the Wisconsin Partnership Program.

The Wisconsin Partnership Program provides funding to Wisconsin community-based organizations in partnership with faculty from the UW School of Medicine and Public Health or from other UW System campuses to improve the health of Wisconsin residents. Through a competitive Community-Academic Partnership Fund Request for Partnerships (RfP), the OAC will fund prevention activities promoting the goals of Wisconsin’s health plan, Healthiest Wisconsin 2020: Everyone Living Better, Longer (dhfs.wisconsin.gov) and aligning with Wisconsin Partnership Program’s mission, vision and guiding principles.

BACKGROUND
Created with funds from the conversion of Blue Cross & Blue Shield United of Wisconsin, the Wisconsin Partnership Program is dedicated to improving the health and well-being of the public through investments in research, education and evidence-based practices leading to environmental, institutional or policy change. The 2009–2014 Five-Year Plan, available at wphf.med.wisc.edu, guides the work of the Wisconsin Partnership Program.

PURPOSE
These grants allow community applicants to: (1) have an impact on the health of Wisconsin residents, (2) work in partnership with faculty and staff from the University of Wisconsin System and (3) adopt evidence-based programs or best-practices that can be shared or taken to scale, or develop innovative programs to serve as models of best practice.

FUNDING PRIORITIES
- Programs aimed at eliminating health disparities.
- Programs that address the health needs of rural and urban underserved areas in Wisconsin.
- Programs targeted to promoting healthy weight, physical activity and good nutrition, and reducing the incidence and severity of overweight and obesity.

ELIGIBILITY REQUIREMENTS

COMMUNITY PARTNER
Eligible community partners are Wisconsin-based, nonprofit, IRS tax-exempt 501(c)(3) and tribal or governmental organizations. Fiscal sponsors are allowed, but under limited circumstances (see page 11). Contact the program officer to discuss fiscal sponsorship.

ACADEMIC PARTNER (Must have Principal Investigator status with an institutional IRB of record.)
- UW School of Medicine and Public Health tenure, Clinical/Health Sciences (CHS) and clinician-teacher track faculty.
- UW School of Medicine and Public Health academic staff and emeritus professors with approval of a UWSMPH department chair or center director.
- UWSMPH volunteer staff and other UW System faculty, including UW Extension, with Principal Investigator (PI) status with an institutional IRB of record.

CONTINUATION/EXPANSION APPLICATIONS
Applicants can apply for a continuation or expansion of a Wisconsin Partnership Program funded project. All continuation/expansion applicants must submit a final report demonstrating successful completion of project objectives and a successful partnership with an academic partner.
RESUBMISSION
Applicants may resubmit an unfunded proposal from a previous grant cycle. Resubmissions are considered new applications and, as a result, will be part of the same competitive process as all other grant applications.

GRANT TYPES, FUNDING SCOPE AND DURATION

DEVELOPMENT GRANTS (limit of 6 pages, single-spaced)

- **Partnership Development**  
  Up to $50,000  
  1 to 2 years  
  Community partners and UW faculty/staff seeking to form sustainable relationships to identify ways they can work together to address public health issues at the local, regional or state level. **Examples of outcomes can include a formal strategic plan, a community action plan or community assessment results.**

- **Pilot/Feasibility**  
  Up to $50,000  
  1 to 2 years  
  Community partners and UW faculty/staff working together to pilot test the effectiveness or feasibility of implementing an intervention and to determine if a particular intervention is appropriate, adoptable or adaptable in a community, a geographic region or with a targeted population. **For example, testing an evidence-based program or promising practice used in an urban area, with a rural population.**

IMPLEMENTATION GRANTS (limit of 10 pages, single-spaced)

- **Small-Scale Implementation**  
  Up to $150,000  
  2 to 3 years  
  Community partners and UW faculty/staff seeking to use evidence-based and promising practice interventions on a small scale with a limited number of participants. Result of well-evaluated small-scale implementation projects can be used to seek funding for large-scale projects in the future. **An example from the What Works for Health Database is evaluating a multicomponent intervention to reduce alcohol-impaired driving (scientifically supported) in a small neighborhood of an urban area.**

- **Large-Scale Implementation**  
  Up to $400,000  
  3 years  
  Community partners and UW faculty/staff seeking to implement programs that are strongly supported by evidence and have sound evaluation plans. Large-scale implementation projects will also address problems using sustainable methods such as local policy change, system or organizational change or environmental change. **An example from the What Works for Health Database is the widespread use of “point of decision prompts” as a strategy to promote active living (scientifically supported) in a school system or organization. Implementation of such a project would lead to enduring change within a community, an organization, a county or statewide.**

*Beginning with the 2012 funding cycle, only existing community-academic partnerships will be eligible for implementation grants. Although the preferred way of meeting this requirement is to complete a Wisconsin Partnership Program development grant, other demonstrated collaboration may be considered.*

**IMPORTANT DATES**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
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<tbody>
<tr>
<td>Request for Partnerships (RfP) and Electronic Notice of Intent (NOI) released</td>
<td>May 7, 2012</td>
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<tr>
<td>Technical Assistance Available (Wisconsin Partnership Program website)</td>
<td>Ongoing</td>
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<tr>
<td>Notice of Intent DUE</td>
<td>June 14, 2012 – 4 p.m.</td>
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<tr>
<td>Notification of invitation to submit full application</td>
<td>July 31, 2012</td>
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<tr>
<td>Technical Assistance Days</td>
<td>TBD</td>
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<tr>
<td>Development/Implementation Full Applications DUE</td>
<td>September 6, 2012 – 4 p.m.</td>
</tr>
<tr>
<td>Expected notification of awards</td>
<td>December 31, 2012</td>
</tr>
<tr>
<td>New Grantee Orientation</td>
<td>February 2013</td>
</tr>
<tr>
<td>Earliest project start date</td>
<td>April 1, 2013</td>
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NOTICE OF INTENT/LETTER OF INTEREST (two pages – due June 14)

Submission of the Notice of Intent is the responsibility of the community agency. Projects will be considered for further development based on alignment with Wisconsin Partnership Program goals and priorities. Forms are available at http://www2.med.wisc.edu/oacnoi/. Submitting a Notice of Intent does not automatically qualify the applicant organization for the full submission process. Selected applicants will be notified by July 31, 2012.

The Letter of Interest is the narrative portion of the Notice of Intent and is part of the web-based application. The Letter of Interest must be in PDF format only, not to exceed two (2) single-spaced pages. Use a minimum of 11-point font and address the following:

- Describe what the project is proposing to do, including the need for the project and the expected impact.
- Define the target audience, including geographic area, rural/urban, etc.
- Explain how the project team will work with the academic partner to address the public health issue.
- Describe the applicant organization and its ability to successfully complete the project.
- Identify the evidence for project activities or intervention (use the What Works Database or other public health evidence-based sources [whatworksforhealth.wisc.edu]).
- Describe how the project will measure success.
- Indicate how the project aligns with the Wisconsin Partnership Program’s guiding principles, mission and vision, and the State Health Plan (dhfs.wisconsin.gov).

TIPS FOR WRITING THE NOTICE OF INTENT/LETTER OF INTEREST

1. Learn about the Wisconsin Partnership Program (wphf.med.wisc.edu).
   - Review the RfP in detail before starting.
   - Review the Wisconsin Partnership Program’s strategic Five-Year Plan and annual reports.
   - Review the Wisconsin Partnership Program website, including grants awarded in the past.

2. Keep the scope of the project manageable.
   - Start with a logic model and be sure outcomes are measurable (www.uwex.edu).
   - Write the Letter of Interest with precision and clarity of purpose.

3. Ask others to review the Letter of Interest before submitting it.

Contact the program officer for more information:
Mary Jo Knobloch, knobloch2@wisc.edu

FULL PROPOSAL GUIDELINES (applicable if invited to submit a full application)

A limited number of applicants will be invited to submit full proposals. Submission of the full application is the responsibility of the community agency. The link to the web-based full application will be provided to applicants. Submit online by 4:00 p.m. CDT September 6, 2012.

GENERAL GUIDELINES (for Implementation and Development Grants)

- All documents must be uploaded onto the online application as PDF with minimum 11-point font, and one-inch margins (single-spaced lines are acceptable)
- Narrative page limits:
  - Development proposals – 6 pages
  - Implementation proposals – 10 pages
- References are not included in the page limit.
- The logic model, work plan, appendices and optional materials are not part of the narrative page limit.
EXECUTIVE SUMMARY
The executive summary must summarize the following elements and will be used as a “stand alone” description of the project (Tip: Write this section last). Limit 1 page.

<table>
<thead>
<tr>
<th>Required Elements (Scoring: 0 points)</th>
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<tbody>
<tr>
<td>Brief background on the significance of the health issue or health topic</td>
</tr>
<tr>
<td>Goal of the project</td>
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<tr>
<td>Brief description of the project</td>
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<tr>
<td>Intended measurable outcomes</td>
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<tr>
<td>Funding request and timeframe</td>
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<tr>
<td>Indication of next steps following project completion</td>
</tr>
<tr>
<td>Description of how the project addresses the State Health Plan, Healthiest Wisconsin 2020 (dhfs.wisconsin.gov), and Wisconsin Partnership Program mission, vision and guiding principles</td>
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Narrative
The narrative (not including footnotes, references, logic model, work plan and appendices) must be submitted as a PDF. Use these six (6) section headings and instructions to write the narrative.

<table>
<thead>
<tr>
<th>1. Project Purpose, Need and Statement of the Problem (Scoring: 15 points)</th>
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<tbody>
<tr>
<td>Describe the purpose and need for the project and the significance of the issue being addressed.</td>
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<tr>
<td>Identify and describe the target population; include demographic information.</td>
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<tr>
<td>Use community, county, regional or state-level data to provide evidence of project need; refer to County Health Rankings, the Wisconsin Report Card and trend data for Wisconsin.</td>
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<tr>
<td>Describe how the project will advance one or more of the health and/or infrastructure focus areas of the State Health Plan and specifically address the objectives associated with the focus area. (dhfs.wisconsin.gov).</td>
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<tr>
<td>*This section should incorporate current local, regional or statewide data to support the need and purpose.</td>
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<tr>
<th>2. Outcomes Related to the Guiding Principles (Scoring: 15 points)</th>
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<tbody>
<tr>
<td>Describe how the project incorporates the Wisconsin Partnership Program’s guiding principles; provide examples and address at least one guiding principle:</td>
</tr>
<tr>
<td>Prevention: Promote health and prevent disease, injury and disability</td>
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<tr>
<td>Partnership: Seek out, encourage and support community-University partnerships</td>
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<td>Enhancement: Advance and replicate innovative and transformational population health programs</td>
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<td>Responsiveness: Accelerate existing and stimulate new initiatives with the greatest potential to improve population health</td>
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<td>Effectiveness: Support the translation and application of evidence-based practices and policies</td>
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<tr>
<td>Sustainability: Enhance and leverage other resources to help programs evolve and become self-sustaining</td>
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<tr>
<th>3. Goals, Objectives and Outcomes (Scoring: 15 points)</th>
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<tr>
<td>Discuss the project’s goals, objectives and outcomes, along with potential activities or interventions</td>
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<tr>
<td>*This section should be consistent with the work plan and logic model.</td>
</tr>
<tr>
<td>Summarize the evidence-base, existing knowledge or research that supports the project or program design, approach or strategy; for more information, refer to What Works for Health database at whatworksforhealth.wisc.edu.</td>
</tr>
<tr>
<td>Describe how the community-academic partnership contributes to the goals, objectives and outcomes of the proposed project.</td>
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<tr>
<td>Describe plans to include the target population in the planning and design of activities and interventions.</td>
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</table>
### 4. Work plan (Scoring: 15 points)

Use the template provided in the web-based application. Submit a PDF project work plan and corresponding timeframe of activities.

* The work plan should be consistent with the logic model and evaluation efforts described in the evaluation section.

### 5. Evaluation, Dissemination and Sustainability Plans (Scoring: 20 points)

**Logic Model.** Using the template provided in the web-based application, submit a logic model. The logic model should be a snapshot of all project activities and expected outcomes.

*Outcomes listed on the logic model should match the overall evaluation plan. Outcomes must be measurable. The logic model should be consistent with the work plan.*

See [www.uwex.edu](http://www.uwex.edu) for more information on building a logic model.

Describe details of the evaluation plan (including plans to measure success, who will measure, what tools will be used, what will be measured and why).

**Dissemination.** Describe a plan for communicating project results to the public health community, other organizations and to policy-makers.

**Sustainability.** Explain how the project will continue beyond the funded period, including how the project can impact environmental, institutional and policy change.

### 6. Capacity and Experience of Partners and Key Staff (Scoring: 20 points)

Describe the capacity of the applicant organization to carry out the project (include the agency’s mission, key staff, clientele and experience in working with the target population).

List staff responsibilities.

Describe the role of collaborating organizations, if applicable.

*If this is a continuation/expansion of a funded development or implementation grant, describe the progress made to date.*

### BUDGET

The project budget should clearly indicate how the grant funds will be spent. Expenditures must:

- Be fully justified, reasonable and clearly related to project goal(s);
- Reflect the activities/tasks listed in the proposal; and
- Explain the sources and amounts of any cost sharing funds, either in-kind or cash match.

Requests should be made by expense type (salary, fringe benefits, travel, supplies, etc.). Provide sufficient detail for individuals unfamiliar with the project so they can accurately review the proposal.

**Use of Funds:** Complete guidelines for allowable/unallowable expenses are available for review on the Wisconsin Partnership Program website along with the 2012 Request for Partnership application materials.

Funds may be used for project-related costs such as:

- Personnel expenses, such as salaries and benefits
- Salary support for academic partners
- Consultant and contract services
- Travel

Funds may **not** be used for:

- Clinical services related to treatment or follow-up for specific health conditions; however, clinical services that involve screening and education, or mobilizing resources to promote health care access may be funded.
- Lobbying
- Indirect or overhead costs
- Capital expenditures costing $5,000 or more with a useful life of two (2) years or more; exceptions may be made for capital expenditures if such equipment is crucial to the primary objectives of the project; Wisconsin Partnership Program approval is required.
- Projects outside the state of Wisconsin
- Supplanting (see below)

**Budget Justification:** A budget justification narrative is required for purposes of describing in detail the major budget line items: salary, fringe, travel, equipment, supplies, consultants/contracts and other costs. The narrative should provide the specifics of why an expense is necessary to achieve the goal(s) and objective(s) of the project.

**ONE-PAGE RESUMES OR BIOGRAPHICAL SKETCHES**
Submit in PDF, resumes or biographical sketches for the project manager and lead staff person (if different people), and the academic partner involved. Limit resumes or biographical sketches to one page each.

**LETTERS OF COMMITMENT (mandatory for each academic partner)**
The letter(s) must provide evidence of collaboration, with specific details on how the collaborating organization(s) and academic partner(s) will be involved or support the project. Explain roles and responsibilities of both the community and the academic partner. Applicants will be asked to submit the letter(s) in the narrative section of the online application.

**NON-SUPPLANTING**
Supplanting means to replace, take the place of, or to supersede. The Wisconsin Partnership Program prohibits any funds from being awarded that will supplant funds or resources otherwise available to applicants from other sources for the proposed project.

All applicants must answer the nonsupplanting questionnaire as part of the application process. As an ongoing check against supplanting, grant recipients will be asked annually to recertify that other funds for the proposed project have not become available or been declined. No grant can be awarded if a determination of supplanting is made.

**FINANCIAL STATEMENTS**
Submit in PDF, a copy of the community organization’s and/or fiscal sponsor’s (if applicable) prior year financial statements or current annual revenue and expense budget.

**IRS DETERMINATION LETTER**
Submit in PDF, a copy of the community organization’s (applicant agency) and fiscal sponsor’s (if applicable) IRS determination letter of tax exempt status, if appropriate.

**COMPLIANCE**
Answer the compliance questions in the online application. A UW-Madison Institutional Review Board (IRB) evaluates all projects involving human subjects research conducted under the auspices of the university.

**TRADE SECRET AND PROPRIETARY INFORMATION**
Applicants must identify and request confidentiality of any trade secrets and/or proprietary information in their applications.

**OPTIONAL MATERIAL (PDF only)**
Submit letters of support or relevant and appropriate materials such as survey forms, training materials, evaluation instruments or draft tools to help describe the work plan and activities proposed.

**SUPPLEMENTAL INFORMATION**

**WISCONSIN PARTNERSHIP PROGRAM MISSION, VISION AND GUIDING PRINCIPLES**
The Wisconsin Partnership Program is dedicated to improving the health of the public through investments in research, education, prevention practices and interventions and policy development. The goal is to show progress in improving the health of individuals, families and communities in Wisconsin.
The following mission, vision and guiding principles are the framework for forming partnerships and collaborations to make Wisconsin a healthier state for all:

**Mission:** The Wisconsin Partnership Program will serve the public health needs of Wisconsin and reduce health disparities through initiatives in research, education and community partnerships.

**Vision:** Making Wisconsin a healthier state for all.

**Guiding Principles:**
- *Prevention:* Promote health and prevent disease, injury and disability
- *Partnership:* Seek out, encourage and support community-University partnerships
- *Enhancement:* Advance and replicate innovative and transformational population health programs
- *Responsiveness:* Accelerate existing and stimulate new initiatives with the greatest potential to improve population health
- *Effectiveness:* Support the translation and application of evidence-based practices and policies
- *Sustainability:* Enhance and leverage other resources to help programs evolve and become self-sustaining

Health improvement is defined in two ways: improving health indicators and health related quality of life, and reducing health disparities. Progress will be determined through effective health policies, interventions and practices over the short-term, and through improvements in health care, health behaviors, social determinants of health and the physical environment over the long-term.

To accomplish the mission and vision, the Wisconsin Partnership Program will invest in a balanced portfolio of geographically and culturally diverse community partnerships, education and research initiatives and community engagement strategies, and support the transformation to an integrated school of medicine and public health.

The Wisconsin Partnership Program values the connection of the UW School of Medicine and Public Health with partners and resources statewide. Through collaboration and partnerships, the people of Wisconsin will benefit from the shared knowledge, experience and resources of the school and communities.

**FINDING EVIDENCE**
Applicants are strongly encouraged to use “What Works for Health: Policies and Programs to Improve Wisconsin’s Health.” This database is based on a wide scan of analyses assessing evidence of effectiveness and provides information on what works and does not work for many different health issues.

**COMMUNITY-ACADEMIC PARTNERSHIPS**
The Community-Academic Partnership Fund is guided by the belief that collaborations between community organizations and academic partners can yield beneficial results in improving the health of Wisconsin. Partnerships begin with a community-identified need and an academic interest. Community leaders bring an understanding of the public health needs of specific populations, access to local resources and a commitment from dedicated staff and volunteers. The University of Wisconsin brings education and research expertise and a service commitment to the state exemplified by the Wisconsin Idea.

**Community and Academic Partner Roles:** The community partner is responsible for submission of the application. The OAC expects academic partners to be actively engaged in the project from serving in an advisory or consulting role to advising on evaluation methods and design, to conducting community engaged research. A document outlining roles and responsibilities of both community and academic partners is needed and submitted as part of the online application process. The applicant must include a letter of commitment from the academic partner outlining intended roles and responsibilities.

**Finding an Academic Partner:** It is important to work with an academic partner who has experience and interest in the project idea. Resources are available to help applicants find a partner, think through project ideas or partnership plans and prepare applications. Contact the program officer if assistance is needed.
REVIEW PROCESS
Notice of Intent/Letter of Interest

- **Initial Technical and Content Review by Wisconsin Partnership Program Staff**
  Staff will review each Notice of Intent (NOI) and Letter of Interest (LOI) to ensure requirements, including eligibility, have been met. Any NOI that does not comply with the submission requirements will not be considered for final review. *Passing this initial technical and content review does not guarantee submission of a full proposal.*

- **Final Content Review**
  OAC members, along with staff, will review the content of the Notice of Intent/Letter of Interest to determine if further development as a full application is warranted. Evaluation of these preliminary “notices” will be based on a combination of alignment with the Wisconsin Partnership Program goals and priorities, the applicants’ presentation of clear goals, measurable outcomes, use of evidence and alignment with the State Health Plan.

Full Application

- **Technical Review by Wisconsin Partnership Program Staff**
  Staff will review each full application to ensure that minimum application requirements, including a nonsupplanting review, have been met. Any application that does not comply with the submission requirements will not advance for further review.

- **Expert Review Panel**
  Each application will be reviewed and scored individually by external review members. Reviewers meet to discuss the proposals. Following the review, they will provide a ranked list along with a critique of each ranked proposal to the OAC. The review panel is comprised of health care professionals, community and public health advocates and practitioners and UW faculty and academic staff. The review panel is advisory to the OAC.

- **OAC Review**
  The OAC will make the final determination of awards in December 2012 based on rank, program objectives and alignment with the Wisconsin Partnership Program mission, vision and guiding principles. The OAC’s decisions are final and cannot be appealed. The OAC may also request that applicants respond to concerns prior to making a decision on the award.

AWARD INFORMATION

The OAC and program staff will negotiate the terms of each grant with applicants and enter into contractual agreements with successful applicants prior to the distribution of any funds. Successful applicants will participate in project orientation, project and fiscal monitoring activities as defined and delineated in the contract terms and conditions.

The OAC reserves the right to establish award amounts and to authorize budget items, program goals and other terms of the proposal prior to entering into an agreement with award recipients. Award recipients may make justifiable modifications in the approved grant budget or project plan only through prior consultation with and written approval of Wisconsin Partnership Program staff.

By applying to the Community-Academic Partnership Fund, applicants agree and consent, without reservation, substitution or limitation, to each of the following:

- Application submission requirements and rules, and the procurement process, procedures and specifications identified in this application, including all appendices and any application forms.
- The evaluation methods, evaluation process, evaluation criteria, scoring and project budget described in this Request for Partnerships.
- The OAC’s sole, unrestricted right to reject any or all applications submitted in response to this Request for Partnerships.
- Supplanting prohibition as dictated by the Insurance Commissioner’s Order and as identified on the non-supplanting questionnaire.
FISCAL SPONSOR ROLE
A fiscal sponsor is a governmental or tax-exempt, 501(c) (3) organization that can distribute funds to organizations or groups that have not received IRS recognition of 501(c) (3) status. Fiscal sponsors must ensure adequate financial control and discretion for specific projects in furtherance of the sponsor’s own exempt purposes. A fiscal sponsor, specifically its board of directors, accepts significant financial and legal liability when it sponsors a project under its 501(c) (3) designation. The fiscal sponsor acknowledges authority over and responsibility for the project including at minimum the following:

- Receipt and disbursement of Wisconsin Partnership Program grant funds.
- Maintaining proper financial record keeping and reporting for the project based on generally accepted accounting practices consistent with the organization’s policies and procedures.
- Preparing all Wisconsin Partnership Program financial reporting requirements.
- Submitting a signed fiscal sponsor agreement with the project applicant identifying the roles and responsibilities of each partner toward the financial compliance of the project.

The fiscal sponsor may assume additional roles and responsibilities as directed and negotiated by the applicant organization. This may include coordination, organizing or staffing roles. The Wisconsin Partnership Program expects that fiscal sponsors will take an active role in the implementation and sustainability of project activities.

Fiscal sponsor criteria:

- Wisconsin-based organization
- State, tribal or local governmental agency or charitable organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code

Contact Mary Jo Knobloch, program officer, at knobloch2@wise.edu.