

A black and white photograph of a group of people in a meeting or workshop. In the foreground, a woman with dark hair is smiling and looking towards the right. Next to her, another woman is partially visible, also smiling. In the background, other participants are seated, including a woman in a striped shirt and a man. A teal-colored overlay covers the bottom half of the image, containing the text.

# The AmerisourceBergen® FOUNDATION

Opioid Resource  
Grant Program

## ABOUT AMERISOURCEBERGEN

AmerisourceBergen Corporation (“AmerisourceBergen”) provides pharmaceutical products, value-driving services and business solutions that improve access to care. Tens of thousands of healthcare providers, veterinary practices and livestock producers trust us as their partner in the pharmaceutical supply chain.

AmerisourceBergen manages the transportation of medication, including controlled substances, from manufacturers to licensed pharmacies and hospitals. We recognize that we have a responsibility to positively impact the communities in which we operate.

Our company’s role in the healthcare supply chain uniquely positions us to contribute important expertise and resources to the battle against opioid misuse in the United States. Within our own operations and by joining other healthcare stakeholders, government entities, civic organizations, law enforcement agencies and individuals; we have made these commitments to address the opioid crisis:

1. Ensure safe and secure pharmaceutical distribution healthcare-related services
2. Maintain operational integrity
3. Advocate for the highest regulatory standards
4. Support the communities in which we operate

## THE AMERISOURCEBERGEN FOUNDATION

To fulfill the Company’s commitments to the communities we impact, AmerisourceBergen created the AmerisourceBergen Foundation (“Foundation”), as a separate, not-for-profit charitable organization, distinct from AmerisourceBergen Corporation. The Foundation receives charitable contributions from AmerisourceBergen Corporation (“AmerisourceBergen”) and others, and uses these resources to support health-related causes that enrich the lives of our global community. To accomplish this goal, the Foundation partners with organizations aligned around similar focus areas.

The Foundation provides funding for programs and organizations that focus on expanding access to quality healthcare—both human and animal—to strengthen communities around the world. As the current epidemic of opioid misuse is afflicting the United States, too many people are experiencing it first-hand as they or their loved ones battle opioid addiction. It is a crisis that demands attention, action, and accountability. For these reasons, we are committed to providing communities across the country with support and resources to combat the epidemic of opioid misuse.

## OUR FOCUS ON THE OPIOID EPIDEMIC

To inform the Foundation's strategy related to opioid misuse, we held an internal focus group with AmerisourceBergen associates and consulted with external stakeholders and experts in the field to understand their perspectives and concerns related to the subject. Safe disposal, and education around prevention, emerged as priority areas for funding. Thus, we have identified key areas of focus that include safe disposal, education around prevention, and innovative solutions to end the opioid crisis.

### **Our Current Initiatives**

To address our areas of focus, the AmerisourceBergen Foundation has funded several grants. However, we know that there is more to be done. To address the safe disposal and destruction of unneeded medications, we launched a separate initiative, our Safe Disposal Support Program.

### **Safe Disposal Support Program**

In December 2017, the Foundation launched a program to provide communities with a safe solution for site-of-use disposal. Specifically, we are offering free disposable resources, like deactivation pouches and products, that deactivate unused or expired prescription medications in a safe and effective manner. We have worked with organizations across the U.S. to distribute these resources and the program is ongoing. For more information about the program, as well as to complete our online application, please see [www.amerisourcebergenfoundation.org](http://www.amerisourcebergenfoundation.org).

# OPIOID RESOURCE GRANT PROGRAM

Understanding the need for expediency, and to simultaneously balance an objective of developing long-term solutions, our initial opioid resource grant offering will be dedicated to generating ideas from those who know best, tapping into bright and innovative community-focused organizations across the U.S.

We invite nonprofit, grant-funded, 501(c)3 organizations to apply for a grant, by providing proposals that describe how the AmerisourceBergen Foundation can best contribute resources and funding to address opioid misuse. Grants will be awarded for the most innovative and constructive community-facing programs and priority will be given to concepts addressing these three key areas of focus:

- Safe disposal management programs
- Prevention education
- Pilot programs for new ideas related to pre- and post-treatment activities

Funding requests for the following are not in line with the above focus areas and will not be considered.

- Treatment-related services
- Academic or scientific research
- Media or advertising (e.g., public service announcements)
- Narcan or equivalent resources
- Funding for new positions (consultants or contractors are acceptable)
- Programming within a hospital, health system or physician practice
- Note, we will only be accepting in-kind requests for Deterra/Dispose RX

See complete “Eligibility Requirements” on page 5.

## [Grant Cycle Timeline and Submission Process](#)

### **Grant Review Process**

The comprehensive evaluation will be accomplished in the following four steps:

- **Step 1:** Foundation manager (“Manager”) reviews Phase 1 Letters of Intent (LOI) to determine eligibility and alignment with the Foundation’s mission and adherence to the listed requirements. Following review of your LOI, a grant administrator will contact your organization via the YourCause Grants Manager Portal to confirm the status. All submissions will be notified in one of the following manners:
  - To request additional details to proceed to Phase 2.
  - To request additional information to substantiate possible next steps.
  - To inform of lack of alignment with grant program or other reason for not advancing to Phase 2. Due to high demand, unfortunately the Manager will be unable to provide feedback.

- **Step 2:** Manager will invite eligible organizations to submit Detailed Grant Proposals and supporting information to the Foundation.
- **Step 3:** Manager will present eligible Detailed Grant Proposals and supporting information to the Foundation External Advisory Committee, for expert review, and ultimately to the Foundation Grant-Making Committee, to review applications.
- **Step 4:** Organizations will receive a notification and accompanying grant-agreement for funded grant proposals through YourCause Grants Manager. All payments are made directly to the organization.

### Grant Program Considerations

- The size of grant disbursements will depend on the needs of each grantee, there is no maximum. We expect the average grant size to be between \$50,000 to \$75,000.
- Grantees may include municipalities and their departments (for in-kind donations only). The Foundation does not make grants to state governments, agencies, or governmental entities with regulatory oversight of AmerisourceBergen.
- In order to be considered for funding, we require any non-profit hospital, health system or affiliated entity to develop a collaborative partner submission with two other non-profit organizations, one of whom will serve as lead applicant and fiduciary. This is required to demonstrate public benefit. Additionally, partners will have entered a documented contract or agreement to work together and upload as part of the application.
- Applicants are strongly encouraged to identify and leverage existing, proven, evidence-based frameworks and strategies.
- Applicants may also propose original and innovative projects related to pre- and post-treatment activities such as job training, housing programs, recidivism support etc., or customize and build upon publicly available projects and/or strategy models.
- Applicants wanting to utilize funds for purchasing DisposeRX or Deterra drug deactivation resources should include this as an in-kind request as part of the application.
- Applications focusing on education may include new concepts or approaches, or proven models. Education initiatives may address a wide spectrum of needs, and priority will be given to the effective dissemination of the following topics:
  - Provider education about appropriate opioid prescribing.
  - Patient education about the risks and effects of prescription opioids, and what to do if they have concerns about addiction.
  - Public education, especially aimed at rural communities.
  - Training to reduce youth risk factors, such as delinquency, and boost protective factors, such as decision-making skills for problem solving and resisting peer pressure.
  - Preventing teens from initiating problematic opioid use.
  - Advising parents of teens to lock up prescription opioid medications and dispose of old pills.
  - How youth can effectively cope when living with adults with addiction.

## Grant Criteria

Grants will be awarded through a two-phase process. To be respectful of submitter's time and resources, in Phase 1, we will initially ask for a high-level overview in the form of a Letter of Intent. Those LOI submissions that move on to Phase 2 will take the form of a Grant Proposal, and will require a more detailed examination of

- Situational needs in the opioid epidemic,
- Possible applications of AmerisourceBergen Foundation's resources, and
- Anticipated impact and results.

## Letter of Intent

We initially seek a 1-2 page Letter of Intent (LOI) describing an overview of opioid epidemic needs and possible approaches to leverage AmerisourceBergen Foundation's resources.

### Considerations for submitting a Letter of intent

- Our goal is to award funding for safe disposal, prevention education, and/or innovative solutions, relating to the needs identified in each submission.
- LOIs will be selected to advance based on the identified solutions.
- Applicant organizations may only submit one LOI at a time.
- Specify the amount of funding required to conduct the proposed initiative. A budget is encouraged and may be submitted as an attachment.
- LOIs will be accepted January 15 through February 15, 2019 and July 15 through August 15, 2019. Unless otherwise indicated, LOIs submitted outside that window will not be accepted.
- If the AmerisourceBergen Foundation determines that your proposal meets the criteria outlined above, as a viable and constructive approach, you will be asked to submit a full proposal.
- The Foundation reserves the right to not advance any proposal for any other reasons.

### LOI Submission Instructions

Submissions must include the following and be submitted via our online system at:

<http://bit.ly/opioidresourcegrants2019>.

Proposals must be completed in full to be considered:

- A descriptive, working title of this funding opportunity.
- Organization name/s and EIN (Employer Identification Number).
- Organization address/es.
- Contact name/s, title/s, phone number/s, email address/es.
- Participating institution(s) and names of other key individuals potentially involved in the solution.
- Describe and specify the target audience and justify the selection of the audience, based on evidence of need and supported by credible data.
- Describe the geographic focus and reach.
- Specify the anticipated amount of funding required to conduct the proposed initiative. Indirect expenses cannot exceed more than 10% of the requested funding. Please use reasonable estimations and approximations in your budget based on



geographic locations and relevant factors. We do not have prescribed standard for this and will not answer questions on this topic. A budget is encouraged and may be submitted as an attachment.

- Grant periods are for one-year only. Multi-year grant requests will not be considered.

#### **Additional LOI information**

- The Foundation reserves the right to not advance any proposal for any other reasons, such as excessive requests, competitive standing, lack of alignment or situational considerations.
- Submitting a proposal does not guarantee funding.
- The Foundation reserves the right to adjust guidelines, submission deadlines and notification dates without prior notice.
- Grant funds may only be used for charitable, educational, and/or scientific purposes.
- The Foundation does not fund efforts to influence legislation, to intervene in political elections or campaigns, to promote propaganda, or to conduct voter registration drives.
- The Foundation does not make grants or loans to individuals and does not directly fund fellowships or prizes.
- Grantee can not engage in discrimination per eligibility requirements.

#### **Detailed Grant Proposal**

Organizations that proceed to Phase 2 will be contacted through the YourCause Grants Management portal and should expect the following process:

- A communication requesting additional information as a formal grant proposal, with additional requirements to assist in decision-making.
- Phase 2 candidates will expect to provide the following documentation, where feasible and possible:
  - Geographic locations where funding will be allocated, to include addresses where possible.
  - References to proven models, philosophies, theories or practical applications of the proposed model or program.
  - A list of all organizations that will be in any way involved in the implementation of the grant, to include nonprofit, government, for-profit, or other.
  - Anticipated outcomes of funding, estimated in six-month intervals.
  - Metrics and data that will be collected.
- Grant recipients will be expected to:
  - Provide the AmerisourceBergen Foundation with updates every six months, or upon request, to include site visits and in-person interactions.
  - Maintain communication regarding successes, milestone and/or challenges.

## Detailed Grant Evaluation Criteria

The following criteria will be used to evaluate Detailed Grants:

### Criterion 1: Project Approach and Management Plan

- Reasonableness of the proposed approach, as evidenced by clear goals, tasks, methods, deliverables, and timeline.
- Originality of the proposed approach; specifically, no duplication of currently funded programs, either by federal, state or other philanthropic organization.
- Degree to which the project supports the mission of the Foundation and ensures desirable outcomes.
- Degree to which the application adequately describes successful implementation of the project.

### Criterion 2: Potential Impact and Sustainability

- Appropriateness of the quantified impacts and deliverables expressed within the application, given the amount of funding requested.
- Evidence of lasting impact and overall sustainability of the project.

### Criterion 3: Budget Form and Budget Narrative

- Line item justification of a complete budget and budget narrative that identifies where and how the awarded funds will be spent. The scope of the budget should not extend longer than one year.
- Reasonableness of costs in relation to proposed activities.

## Performance Reporting

All recipients of Foundation grants will be expected to update the Foundation every six months, and submit a report within 60 days of the one year conclusion of receiving their grant outlining the impact the grant had on its organization, community and specific population served. A project narrative should include the following:

- A list of original goals and whether these were met.
- The ways in which the actual project varied from the initial project plan.
- If applicable, selected material related to the funded project.
- A list of the most significant results gained from this project. For example, how many people benefited, in what ways, etc.
- A description of the important lessons your organization learned from this project.
- A detailed, complete accounting of how the specific grant dollars were spent, including a project financial statement if appropriate.
- The Foundation reserves the right to adjust program evaluation guidelines/reporting and metrics without prior notice.

If you or your organization is not interested in submitting for a grant, but have ideas or want to provide input, or have questions, please contact us at [abcfoundation@amerisourcebergen.com](mailto:abcfoundation@amerisourcebergen.com).



# APPENDIX

## Foundation Governance

The Foundation is a nonprofit, 501(c)(3) charitable organization that is distinct from the AmerisourceBergen Corporation. The Foundation is governed by a Board of Directors and a Grant-making Committee (“Committee”) that together provide effective, on-going decision making on behalf of the Foundation. The Foundation’s Committee is responsible for reviewing applications, resolving questions, interpreting eligibility requirements, and approving requests for grants or sponsorships. The Committee represents a broad range of leaders representing a cross-section of AmerisourceBergen business units and corporate functions. The members will act on behalf of the Foundation rather than as representatives of AmerisourceBergen.

For the specific purposes of grant-making related to opioid misuse, AmerisourceBergen Foundation has established voluntary External Advisory Committees (EACs) comprised of key stakeholders and thought leaders from academia, healthcare, law enforcement and recovery, with the goal of providing resources and helping prevent the misuse of opioids.

The EACs will help guide the Foundation’s efforts related to opioid misuse support with a shared mission to provide resources and help prevent the misuse of opioids. The EAC’s role will be to share recommendations with AmerisourceBergen Foundation grant-making committee and identify organizations for grant consideration. The scope of the EAC is purely advisory – there is no decision-making authority. In addition, all EAC members sign conflict of interest and confidentiality forms and do not review or provide input on any grants where they have prior knowledge of the organization or any type of fiduciary responsibility. As a recognition of their investment of time in this process, a donation of \$5,000 is made to a selected non-profit organization.

## Grant Eligibility Requirements

- The Foundation does not make grants to customers, or affiliates of customers, of AmerisourceBergen.
  - The Foundation may fund a project or program of a coalition that includes one or more customers (as long as such customer is a non-profit entity) or the charitable affiliates of customers of AmerisourceBergen Corporation as long as the following conditions are met: (1) the grant must be restricted for charitable purposes, (2) the grant may not be paid to the customer or its affiliate, and (3) the coalition must be memorialized by a letter of intent or memorandum of understanding.
- The grantee’s project or program must align with the Foundation’s mission and areas of focus.
- The grantee’s project or program cannot be limited to serving a narrowly defined group of individuals, but must instead serve a broad charitable class.
- The grantee cannot lobby as a substantial portion of its activities, support political causes or campaigns, or operate to benefit or promote the interests of elected officials.
- The grantee cannot engage in discrimination based on race, color, religion, age, nationality, social or ethnic origin, sexual orientation, gender, gender identity or expression, marital status, pregnancy, political affiliation, disability or veteran status.

The AmerisourceBergen®  
FOUNDATION

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