

20 Years of Advancing a Healthier Wisconsin

Leveraging the Combined Power of Philanthropy and Academic Medicine, AHW Provides Funding and Resources to Researchers, Organizations and Communities to Improve the Health of the People of Wisconsin.

By Richard N. Katschke, Kelly Lietz and Sara L. Wilkins

More than 20 years ago, the Advancing a Healthier Wisconsin (AHW) Endowment was established by the Medical College of Wisconsin (MCW) to steward a generous financial gift of more than \$303 million from the conversion of Blue Cross & Blue Shield United of Wisconsin from a nonprofit insurance organization to a for-profit corporation. The proceeds of the conversion were divided between Wisconsin's two medical schools – MCW and the University of Wisconsin School of Medicine (now the UW School of Medicine and Public Health) – and a permanent endowment was created at each institution.

Since issuing its first funding awards in 2004, AHW has invested more than \$338 million into more than 600 projects focused on community health improvement, research and health workforce education – bettering the lives of people throughout the state and fueling scientific discoveries that are enhancing the medical care of millions in Wisconsin and beyond. AHW investments have reached all corners of Wisconsin, with direct funding provided to organizations in 66 of Wisconsin's 72 counties. From urban centers to rural and agricultural communities and self-governed tribal nations, AHW is committed to maximizing the health of all Wisconsinites.

In addition to grant funding, AHW develops and delivers resources that add value to the partners it serves, building capacity within Wisconsin's health ecosystem and extending the impact of its investments to maximize opportunities for people and communities throughout the state to thrive.

What follows is an overview of the Advancing a Healthier Wisconsin Endowment – from the seeds that were planted by the Blue Cross & Blue Shield United of Wisconsin conversion to AHW's position today as Wisconsin's largest health improvement philanthropy and the only health philanthropy in the nation stewarding public funds from within a private medical school.

Public Stewardship of AHW

The oversight of AHW is carried out by two major governance committees: the MCW Consortium on Public and Community Health (the Consortium) and the Research and Education Advisory Committee (REAC).

The Consortium is a nine-member body that provides oversight for AHW's investments and support of community and public health partnerships and projects, and serves in an advisory capacity for investments in research and education. As directed by the Wisconsin Insurance Commissioner, the Consortium comprises four members representing statewide and community healthcare advocacy organizations, four members representing MCW and a member appointed by the insurance commissioner.

The REAC is a nine-member entity comprising MCW faculty and executive leaders. The REAC provides oversight for AHW's investments and support of MCW's biomedical and population health research, as well as programs to enhance education opportunities for the health workforce.

AHW currently administers two key programs:

- **Healthier Wisconsin Partnership Program (HWPP)**

With input and direction from the Consortium, AHW directs 35 percent of its investments toward public health improvement initiatives conducted through community-academic partnerships.

- **Research and Education Program (REP)**

AHW works with the REAC to direct 65 percent of its investments toward advancing discoveries in biomedical research, health provider education and workforce development initiatives.



Current AHW Consortium Members

Rebecca “Reba” Rice, MA, Chair, CEO, NorthLakes Community Clinic

Jesse M. Ehrenfeld, MD, MPH, Senior Associate Dean; Director, Advancing a Healthier Wisconsin Endowment; MCW Professor of Anesthesiology

Stephanie Harrison, MA, CEO, Wisconsin Primary Health Care Association

Joseph E. Kerschner, MD '90, FEL '98, Provost and Executive Vice President, MCW; the Julia A. Uihlein, MA, Dean of the MCW School of Medicine

Catherine Kolkmeier, MS, Executive Director, Medical Health Science Consortium

Ian B.K. Martin, MD, MBA, Professor and System Chair, MCW Department of Emergency Medicine; Emergency Medicine Physician-in-Chief, Froedtert & the Medical College of Wisconsin health network

John R. Raymond, Sr., MD, President and CEO, Medical College of Wisconsin

Tony Shields, MSM, President and CEO, Wisconsin Philanthropy Network

Paula Tran, MPH, State Health Officer and Division of Public Health Administrator, Wisconsin Department of Health Services

The Blue Cross & Blue Shield United of Wisconsin Conversion

In late May 1999, then MCW president and CEO T. Michael Bolger, JD, received a call from Thomas Hefty, president and CEO of Blue Cross & Blue Shield United of Wisconsin (BC/BS), regarding the non-profit insurance company’s plans to convert to a stock-owned company. Hefty informed Bolger that BC/BS intended to donate the assets of the company to Wisconsin’s two medical schools. The estimated donation to MCW and the University of Wisconsin School of Medicine would be \$125 million to each institution.

At a news conference held at MCW on June 3, 1999, announcing the BC/BS conversion and the stewardship of the company’s assets by the two medical schools, Bolger said, “This magnificent gift couldn’t come at a better time, on the eve of a new millennium. We are excited about what this offer means to advancing the cause of public health in Wisconsin. We

are facing major new challenges in public healthcare at a time when medical science is advancing rapidly and producing new breakthroughs in battling illness. We accept the challenge to make the health of our Wisconsin people the best in the nation.”

Recently, Hefty recalled that “the [Blue Cross & Blue Shield] board looked at alternatives. They looked at doing a United Way-type gift and creating a new organization to distribute money. But the board felt that building that structure would entail significant administrative cost and probably never would have the medical expertise that already existed in the two medical schools. And so using the medical schools to make those decisions was both economical . . . and scientifically more appropriate.”

BC/BS asked the two medical schools to jointly develop plans about how they would use the company’s assets to improve the health of Wisconsin’s citizens – although the funds could not be used for patient care

programs or for the construction of new facilities. Bolger named Cheryl Maurana, PhD, then director of MCW’s Center for Healthy Communities in the department of family and community medicine (and currently MCW Eminent Scholar, senior vice president for strategic academic partnerships, professor of population health and founding director, Kern National Network for Flourishing in Medicine), to lead and craft MCW’s plan for the conversion funds.

On September 29, 1999, MCW and the UW School of Medicine submitted their joint plan for use of the conversion funds. The plan was accepted by the BC/BS board of directors. The next step was approval by the Wisconsin Commissioner of Insurance, who called for public hearings to obtain citizen input about the conversion plans submitted by the two medical schools.

The conversion process continued for five years as various organizations mounted legal challenges to the gift – leading all the way to the Wisconsin Supreme Court. It wasn’t until March 2004 that the two medical schools received funding from the conversion. By then, the value of the company’s assets had grown, and each medical school received more than \$303 million.

Recalls Dr. Maurana, “In 2001, I became senior associate dean for public and community health. And Dr. Michael Dunn, who was dean of the MCW School of Medicine at the time, invited me to work on this new initiative. We weren’t really sure what it would be, but it seemed like a wonderful opportunity to advance our relationship with the community

Recently, Thomas Hefty reviewed newspaper clippings about the Blue Cross & Blue Shield United of Wisconsin conversion in 1999 that ultimately resulted in the creation of AHW.





and to improve health in a number of different ways. Of the more than 300 or so conversions to endowments that occurred in that period of time, ours was the only one that went to the two medical schools. That was very unique – and it really was transformative for these two institutions.”

(Extensive details on the five-year process from the announcement of the gift to the creation of AHW can be found in Richard Katschke’s *Knowledge Changing Life: A History of the Medical College of Wisconsin, 1893–2019*, available at mcw.edu/historybook.)

The First Five-Year Plan (2003-2008)

AHW produces its first Five-Year Plan outlining the proposed use of available

funding for community-based health improvement initiatives, health workforce education and medical research.

The Second Five-Year Plan (2009-2014)

MCW’s board of trustees approves AHW’s second Five-Year Plan, which includes initiatives aimed at violence prevention; a commitment to develop a community-friendly institutional review process; a greater emphasis on training faculty about community engagement and incentivizing their participation; and allowing flexibility to award funds in larger amounts for longer periods of time. Other enhancements include expanded Principles of Stewardship to reflect building academic and community strengths and new knowledge.

Notably, in July 2012, AHW awards MCW a \$4.3 million grant to engage in a “thoughtful, deliberate three-year curriculum development process” to

create regional medical school campuses in Green Bay and Central Wisconsin (the campuses opened in July 2015 and July 2016, respectively).

The Third Five-Year Plan (2014-2018) *Moving from Grantmaker to Changemaker*

MCW’s board of trustees approves AHW’s third Five-Year Plan titled *Moving from Grantmaker to Changemaker*. This innovative focus leverages resources to build capacity, innovate and catalyze change for health improvement across Wisconsin. Changemaker roles include that of high-impact investor, learner, convener and influencer.

In June 2015, AHW invests \$3.0 million to help establish the MCW School of Pharmacy to address a growing shortage of pharmacists in Wisconsin and to reshape pharmacist training in the state to meet emerging and future patient needs.

Support for Degree Programs

AHW has advanced the state’s health workforce through foundational investments in MCW’s regional campuses and in 20+ MCW schools and degree programs.

(Number of programs noted in parentheses.)

BS/MS	PharmD
Certificates (3)	ME
MD/PhD	MPH
MD/MPH	MSPA
MD/MS	MSA
PhD (3)	MS (6)
DrPH	

Jesse M. Ehrenfeld, MD, MPH

Jesse M. Ehrenfeld, MD, MPH, has served as director of the Advancing a Healthier Wisconsin Endowment, senior associate dean, and tenured professor of anesthesiology at the MCW School of Medicine since September 2019. He divides his time among clinical practice, research and directing the strategic and operational advancement of AHW.

Under Dr. Ehrenfeld’s leadership, AHW has awarded \$82.5 million in grants into community and research initiatives aimed at improving health and advancing health equity in Wisconsin. Dr. Ehrenfeld currently serves as president of the American Medical Association and is a fellow of the American Society of Anesthesiologists and the American Medical Informatics Association.





**The Fourth Five-Year Plan (2019-2023)
Changemaking for a Healthier Wisconsin**

MCW’s board of trustees approves AHW’s fourth Five-Year Plan titled *Changemaking for a Healthier Wisconsin*, with an emphasis on catalytic philanthropy.

The plan notes AHW’s intention to more purposefully move the needle on Wisconsin’s health through its investments and changemaking roles while looking to strengthen AHW’s commitment to address the determinants of health that lead to poor health outcomes and unacceptable health disparities. It also describes how AHW would build on the efforts and experiences of the past to achieve greater results for the future – serving as a strategic roadmap for improving health for everyone in every corner of Wisconsin.

The Fifth Five-Year Plan (2024-2028)

Upon the fulfillment of the overarching aims of AHW’s fifth Five-Year Plan, and following the implementation of important and effective adaptation to fight COVID-19’s immediate and long-term effects on the health and well-being of the people of

Wisconsin, the 2024–2028 Plan states that AHW would turn its attention to new and persistent health challenges that prevent people, populations and communities throughout the state from achieving their full potential.

To inform the development of the 2024–2028 Five-Year Plan, AHW undertook a multipronged effort to gather input and feedback on its vision and role in advancing health statewide. The stakeholder feedback process created space and opportunity for AHW to listen to, collaborate with and inform its stakeholders.

AHW’s continuous and meaningful engagement with those whose missions complement AHW’s helps foster the connections, trust and confidence in key initiatives that require both collective resolve and collaborative action.

The plan notes: “From urban centers to rural and agricultural communities and self-governed tribal nations, we are committed to maximizing the health of ALL Wisconsinites and developing programs, partnerships and knowledge-sharing opportunities aimed at achieving

health equity. . . We recognize and strive to overcome disparate societal and environmental factors affecting the health and well-being of people, communities and populations throughout Wisconsin. Correcting the structural inequities that disproportionately affect the health of underserved and under-represented populations is a primary focus of AHW’s work.”

The plan’s “Framework for Success” is built on three critical drivers toward impact: public and community health improvement; health workforce education and development; and health-focused research.

“For the next five years, AHW’s strategic plan is pretty simple,” shares Jesse M. Ehrenfeld, MD, MPH, director of AHW. “Making sure that we invest our dollars where they are going to have the most impact and where they are needed the most. We will continue to make major investments in education and workforce, major investments in biomedical research, and major investments in public and community health.”



Significant Projects and Initiatives

National Fellowship to Advance Health Policy

AHW currently funds a two-year National Academy of Medicine Fellowship to Advance Health Policy. This program provides talented, early-career health science scholars from Wisconsin the opportunity to participate in evidence-based healthcare or public health studies that improve access and quality to patient care. It focuses on patients in domestic and global health care systems – bringing national best practices to Wisconsin while also sharing Wisconsin’s experience nationally.

National Advisory Committee

AHW formed a National Advisory Committee in 2023 to tap the perspectives and expertise of the nation’s top thought leaders on community and public health, and to provide both formal and informal counsel on its strategic goals and major activities. It drew enthusiastic responses from 16 eminent scholars, organizational leaders and public health practitioners from across the US.

Building Cancer Research Capacity

Leveraging the expertise of Ugwuji Maduekwe, MD, MMSc, MPH, a nationally recognized surgical oncologist and health disparities researcher hired in 2021 who currently serves as AHW deputy director and associate dean, the Endowment is funding a series of projects that will allow researchers at the MCW Cancer Center to more effectively develop treatments for cancer. These projects include *The Origin and Function of Cancer-Associated Fibroblasts in Pancreatic Cancer*; *Integrated Program in Immuno-Oncology*; *Leveraging a New Translational Metabolomics Resource to Identify Cancer Pathways and Signatures*; and *Solving Protein Structures to Uncover Molecular Mechanisms of Cancer*.

AHW also is funding the Community and Cancer Science Network – a broad collaborative committed to reducing breast and lung cancer disparities in Wisconsin through engaging a network of community and academic partners through a process to transform partnerships.

COVID-19 Response

When COVID-19 hit Wisconsin in 2020, AHW stepped forward to deliver support to active grantees while also rapidly developing and releasing a statewide funding opportunity that ultimately enabled partners across public and community health, healthcare and biomedical and population health to respond collaboratively.

In April 2020, AHW announced the award of \$4.8 million to 17 projects that aimed to take immediate actions to protect health and support the response to COVID-19 in Wisconsin over the earliest and most difficult days of the pandemic response.

One year later, AHW announced an additional award to support a coalition working to increase vaccination rates in Milwaukee County, focusing on highly impacted and high-risk ZIP codes. Currently, AHW’s work has pivoted from a rapid response toward

sustained support and recovery. It continues to connect across the state to identify where critical needs remain and where its work can best address the root causes of inequities that COVID-19 so clearly highlighted.



The Advancing Behavioral Health Initiative

Fueled by the power of communities to build the networks, systems and structures best suited to address residents’ health challenges, the Advancing Behavioral Health Initiative set a new standard for large-scale mental and behavioral health improvement. This strategic, coalition-centered approach combined significant funding with the resources, time and support communities needed to develop and implement customized action plans and to evaluate the impact and sustainability of their programs.

From reducing the number of youth experiencing depression to creating individualized de-escalation plans for emergency responders to use in a mental health crisis, community partners worked together to develop best practice models that can be replicated elsewhere in Wisconsin. The initiative provided 10 community partners across Wisconsin with eight years and \$20 million in total to form coalitions, identify priorities, build sustainable programs and measure their effectiveness.



Investments in Wisconsin’s Native American Communities

Five projects focused on enhancing the health of Wisconsin’s Native American communities are: 1) building a community-driven process to implement smoke-free policies in tribal housing and to support tribal communities to end the acceptability of commercial tobacco use while respecting the tradition of ceremonial tobacco use; 2) preventing the spread of COVID-19 in tribal communities by working collaboratively to focus on disease prevention efforts; 3) empowering participating clinics to





enhance the quality of life for Native American cancer patients/families and to develop culturally appropriate cancer programs and services; 4) strengthening and restoring protective factors and decreasing excessive drinking among Native American adults by 10 percent; and 5) utilizing the Tribal Elder Food Box program to demonstrate the feasibility of an intertribal agriculture and food cooperative and to increase access to healthy, indigenous and traditional foods in Wisconsin tribal communities.

Pediatric Readiness Program for Community Emergency Departments

AHW supports children's health equity in Wisconsin through health research funding for projects that improve children's health and the availability of children's health resources. A 2021 AHW grant was awarded to an innovative partnership between the Children's Health Alliance of Wisconsin and Lorin Browne, DO, an MCW professor with a wealth of knowledge about issues faced by children and parents in emergencies. These partners aim to develop, test and refine a *Pediatric Readiness Implementation Guide* to support community emergency departments in providing quality, evidence-based pediatric emergency care.

Increasing Health Literacy

Three projects focused on increasing health literacy are: 1) designing a patient-centered prescription label using easily understandable language; 2) adopting easier-to-read labels, taking user-friendly prescription labels statewide and expanding use to areas with greatest needs; and 3) working with Wisconsin health systems to adopt changes in the electronic health record software that will make the use of evidence-based prescription labels and directions for use the default choice for prescribers.

Increasing Cardiac Arrest Survival in Milwaukee County

Two projects focused on increasing cardiac arrest survival in Milwaukee County are: 1) increasing bystander CPR rates by establishing a system that assures quality CPR instructions are provided to 911 callers; and 2) expanding efforts to change the infrastructure of all 911 call centers in Wisconsin to provide every 911 caller the opportunity to increase cardiac arrest survival through dispatcher-provided just-in-time CPR instructions.

Changing the Culture of Risky Drinking Behavior

Two projects focused on changing the culture of risky drinking behavior are: 1) building upon a previous funding award that developed a community-driven strategic plan to reduce the culture of risky drinking in La Crosse, Wis., project partners are aiming to translate evidence-based strategies into action in order to reduce underage access and use of alcohol in La Crosse County; and 2) expanding partnerships with tavern owners and local festival organizers, policymakers and others to create policy and system changes that will result in a safe environment for alcohol consumption through changes in local alcohol licensing policies; practices on college campuses, in taverns and at festivals; and by educating current and future leaders in community collaboration.

Looking Back – and Moving Forward

"The gift of the Blue Cross & Blue Shield Endowment to MCW has been absolutely transformative. It's catalyzed so many innovations at MCW and has allowed us to invest in partnerships throughout the state that we otherwise would not have been able to accomplish," says John R. Raymond, Sr., MD, president and chief executive officer of MCW.

Dr. Raymond continues, "MCW has used AHW to help to enhance and build a contemporary workforce for healthcare and public health in Wisconsin through partnerships, investment in new programs and catalyzing new ideas. For example, AHW provided startup funds for our two regional campuses, which at the time was incredibly innovative for a medical school, especially a private one to do. It also allowed us to begin an innovative three-year pharmacy school."

Joseph E. Kerschner, MD '90, FEL '98, executive vice president, provost and the Julia A. Uihlein, MA, Dean of the MCW School of Medicine, is proud of the contributions of the AHW Endowment and grateful for the vision of providing the conversion funds to Wisconsin's two medical schools. "I think the medical schools have been good stewards of those funds. We've worked with communities and partners to create systems that give back and really catalyze the ways in which we can have a healthier Wisconsin."

Reflecting on AHW's two successful decades, Dr. Ehrenfeld remarks, "Our ability to garner trust is a cornerstone of who we are as an organization, which starts with the foundational oversight that we have from our public and community health partners. It starts with building trust through our relationships with community partners in every corner and county of the state. And it starts with our faculty and community partners being such incredible stewards of these dollars to execute the mission of the Endowment."

Looking to the future, Dr. Ehrenfeld adds, "AHW is making sure that we can adapt to new health challenges by constantly surveying the landscape, understanding the drivers and the determinants of health of our communities, and then aligning our resources and our requests for applications with those health needs. We've given out more than the value of the original gift and we have more than the value of the original gift in reserves. That's important because this fund will always be there to elevate the health of our communities, support the expanding health workforce and invest in public and community health." ■

