Request for Applications (RFA)
TSET Legacy Grants
092-Legacy

Important Viewing Instructions

If you are viewing this document in a web browser, some features **will not work properly**.

To ensure full access to all content and functionality, please **download this file and open it using Adobe Acrobat Reader**.

You can download Acrobat Reader for free at get.adobe.com/reader.

Forms, clickable sections or other interactive elements will not work correctly unless opened in Adobe Acrobat Reader.

Contents

TSET

Oklahoma Tobacco Settlement Endowment Trust
Legacy Grant Request for Applications

Overview

The TSET Board of Directors has created a historic funding opportunity, TSET Legacy Grants, for time-limited, launch-ready, large-scale initiatives that align with the Agency's mission of improving health and reducing the risk factors for the leading causes of preventable death due to cancer and cardiovascular disease.

TSET Legacy Grants provide a unique opportunity to create significant and meaningful health impacts across Oklahoma. **TSET Legacy Grant funding is <u>not</u> meant to sustain an existing program or replace current funding.** Once TSET funding has ended, the expectation is that a significant portion or all of the project TSET funded is likely to continue.

TSET Legacy Grants will have a minimum requirement on applications of at least $3 million per project. Projects must span at least one year, with the TSET-funded project phase to be completed within three years. Significant outcomes are required for each year of requested funding. All grant activities and expenditures should occur between calendar years 2026-2028. High performing grants may have the option to submit a proposal for two additional years as funding is available.

All applications must be related to one of the TSET mandated purposes as defined in Article 10, Section 40 of the Oklahoma Constitution:

- **Tobacco Prevention and Cessation:** Cost-effective strategies to prevent and reduce tobacco use.

- **Health Improvement:** Programs designed to maintain or improve the health of Oklahomans or to enhance the provision of health care services to Oklahomans, with a particular emphasis on programs for children.

- **Children:** Programs and services for the benefit of Oklahoma children, with particular emphasis on common and higher education, before- and after-school and preschool programs, substance use prevention and treatment programs, and other programs and services designed to improve the health and quality of life of children.

- **Older Adults:** Programs and services designed to enhance the health and well-being of Oklahoma older adults.

Innovative projects and initiatives are encouraged. Below are some examples of specific areas of interest that the TSET Legacy Grants may impact. **This list is for example purposes and is not exhaustive or prescriptive. Applications outside of these areas may be considered and should align with TSET's Constitutional mandates.**

Area of Focus	Programs/Services
Rural Health	- Efforts that promote physical activity, healthy eating and healthy lifestyle habits among school-age children - Development of launch-ready built environment infrastructure to expand opportunities for physical activity and/or healthy eating - Supporting statewide organizations addressing rural community needs such as increasing access to transportation, food pantries, weatherization, housing, etc. - Efforts to reduce youth tobacco use - Other innovative approaches that align with this area of focus
Healthcare Access Improvement	- Statewide access to virtual physicians and specialists - Increasing access to cancer treatment statewide - Increasing medical residencies across Oklahoma - Seed grant funding for healthcare access in rural and underserved areas - Specialized medical equipment used directly to reduce cancer and cardiovascular disease - Capital funding to enhance health care infrastructure and expand the capacity to serve a greater number of patients - Healthcare access innovations such as telemedicine - Expanding capacity for health care degrees at state and regional universities - Increasing graduates with health care degrees (RN, NP, etc.) with focus on scholarships and recruitment - Incorporate specialty care health care services - Other innovative approaches that align with this area of focus
Addressing Data Gaps	- Enhanced access to data on obesity and tobacco use to better inform and guide efforts in addressing these issues - Other innovative approaches that align with this area of focus
Early Prevention	- Increasing access to affordable fresh fruits and vegetables to improve population health - Community-driven prevention efforts that address social determinants of health - Reducing risky behaviors in youth and adverse childhood experiences - Statewide efforts to prevent youth tobacco use - Other innovative approaches that align with this area of focus
Enhancing Quality of Life	- Novel or innovative approaches to tobacco cessation - Tobacco cessation-related financial incentives for high-risk populations as determined by appropriate health data sources - Other innovative approaches that align with this area of focus.

Capital Improvement and Construction Projects

Proposed capital improvement and built environment construction projects must demonstrate the ability to achieve significant construction milestones within the first 12 months of a fully executed cooperative agreement. *TSET prefers launch-ready projects* with the planning, design phase and all necessary approvals completed. A project is considered launch-ready when all planning, design, and permitting processes have been completed and the project site is prepared for immediate or near-immediate construction. Capital improvement and built environment applications that include a planning or design phase <u>and</u> a construction phase may be considered.

Construction projects must be carried out on property that is owned, managed or otherwise controlled by the applicant organization at the time of grant application submission. The property must be open and accessible to the public during reasonable usage hours within the state of Oklahoma. **Projects involving the potential declaration of eminent domain will not be considered. Applicants should have existing control of the project's right-of-way.**

Non-Capital Improvement Projects

Non-capital improvement projects must be in an advanced stage of planning at the time of application, be capable of directly serving the proposed populations of focus within the first 12 months of the grant, and positioned to achieve significant outcomes within the first year of the grant.

Public Accessibility of the Project

All applications must be for projects, goods, or services that are available to all Oklahomans regardless of income. If an applicant organization charges a fee for access to its services, the applicant must demonstrate that the proposed project would be available to all Oklahomans free of charge, according to a sliding fee scale, scholarships, or other proposed option. For example, if a sports entity that requires annual dues from its members submits an application to fund improvements to its activity areas, the applicant entity must demonstrate in its application how all Oklahomans, regardless of income, will have an opportunity to access the TSET-funded improvements.

Eligibility

Eligible organizations include:

- Public institutions of higher education (research and regional universities and colleges)
- State agencies
- Non-profit 501c3 organizations
- Public entities such as county/local government, public school districts
- Tribal entities

All applicant organizations must have an Oklahoma business presence, and a physical office located within the state of Oklahoma. Proposed funding must be allocated solely to support programs and projects that benefit Oklahomans. If the project involves multiple partners, the applicant organization

will act as the primary contractor and fiscal agent, handling all contract, management and financial responsibilities. Additionally, all eligible organizations must be in good standing with the Oklahoma Secretary of State.

Awards will not be made to organizations that receive funds or benefit from tobacco sales. Organizations applying must be able to certify that they neither have a direct or indirect affiliation or contractual relationship with a company engaged in or funded by the manufacture of tobacco products nor will it accept funding from those companies. Cities receiving sales or use tax on tobacco products are not excluded from applying.

TSET acknowledges the spiritual and ceremonial value that tobacco has in Native American culture. Phrases such as "tobacco-free" mentioned in this document refer to commercially produced tobacco products and non-ceremonial use of tobacco. Any tribal nation that is awarded a funding agreement must submit to TSET a signed limited waiver of sovereign immunity prior to execution of a cooperative agreement. A limited waiver of sovereign immunity is one that strictly applies to and addresses the provisions and requirements of this grant. With a limited waiver, organizations applying for TSET funding must meet the tobacco-free requirements, including having a tobacco-free workplace policy. For example, an eligible entity within tribal jurisdiction that applies for a TSET grant should have a tobacco-free premise policy.

Because the grants are paid on a reimbursement basis, organizations must be able to demonstrate the capacity to sustain programmatic work, manage, and expend funds for up to six months while awaiting reimbursement.

TSET seeks to work with qualified organizations that:
- Demonstrate the ability to spend reimbursable grant dollars annually within the allotted time frame
- Utilize evidence-based or promising practices
- Will have wide reach/audience
- Propose projects that achieve significant milestones during the first 12 months of funding. This means that the project is at an advanced stage of planning or is, at a minimum, in the early implementation of the project.

Funding Information

This funding opportunity funds **time-limited, launch-ready** programs with an agreed upon budget, work plan or project plan, and funding cycle. The TSET Legacy Grant has a total pool of up to $150 million. Funding will be allocated based on the strength of proposals. Awarded grants may be renewed for an additional two years based on grant performance, availability of funds, and approval by the TSET Board of Directors. **All awards are paid on a reimbursement basis; awarded organizations must be able to expend funds up front before TSET will reimburse for any charges.**

Matching funds are encouraged but not required; preference may be given to applications with matching funds to achieve a greater reach, impact, and sustainability. Matching funds will be

considered only if they have been confirmed prior to or at the time of application submission. Allowable match includes cash, other non-TSET grants, and in-kind support that is directly related and applied to the program.

Eligible match refers to matching funds spent only during the contracted year. Cash matches refer to a direct program expense for the grantee or partner organization, whereas in-kind match refers to materials or services, space, labor, equipment, etc., provided by the grantee organization or donated by a partner organization specifically for the TSET funded portion of the program. Only match that is directly related and applied to the program is allowable. In no instance may TSET funds be used to match other TSET funds.

If matching funds are used from another source, it is highly recommended to confirm in writing the funder allows the money to be used as matching funds. See **Appendix A,** Matching Funds Guidance, for additional information.

Funding and Renewals

- Minimum funding request for the life of the grant: $3,000,000
- Maximum funding period: Three years
- Matching funds are not required, but preference is given to applications with **confirmed** matching funds to achieve a greater reach, impact, and sustainability
- Grant performance is reviewed on an annual basis and performance measures include:
    - Timely and accurate submission of required documentation
    - Effective project oversight and management, including the ability to hire staff and/or subcontractors in a timely manner (if applicable)
    - Continued progress in accordance with the action and evaluation plan
    - Fulfillment of other funding committed to the program (when applicable)

Examples of unsatisfactory performance include continued difficulty maintaining appropriate contract management and project oversight, a lack of progress toward completion of project milestones/major activities, a loss of non-TSET funding (if applicable), or other major factors detrimental to the success of the project. Unsatisfactory performance may result in termination of TSET funding at any time.

The TSET Board of Directors reserves the right to amend this Request for Applications at its sole discretion and as it deems necessary. RFA amendments can be found on TSET's website under the section **TSET Legacy Grants.** It is the responsibility of the applicant to review any such amendments and make necessary changes in the application to meet the amended requirements.

Submission of a final application does not guarantee award of a grant. The Board of Directors may assign preference to a class of applicants for any application. The final decision to award shall be made at the sole discretion of the TSET Board of Directors.

Measuring Impact

All grant projects must have specific **performance metrics** such as changes in health outcomes, the number of interventions delivered, and overall effectiveness in achieving the project's goals. The funding request should include provisions for a third-party evaluator who will develop a formal evaluation plan within the first six months of the funding cycle and monitor progress toward meeting the established performance metrics.

A grantee's third-party evaluator may be asked to share their evaluation plan/design with TSET's external evaluator for review, comment, and recommendations. The grantee's final evaluation plan/design must be approved by TSET before it is launched.

Post-Project Evaluation

Depending on the size and purpose of the project, a grantee may be asked to work with a TSET assigned external evaluator on the implementation of a post-project or follow-up evaluation design of the project's public use. If asked, the grantee must agree to cooperate and support activities outlined within the external evaluation.

Public Awareness & Brand Support

Successful applicants shall support project/program awareness of TSET's funding through project communications, recognition of funding, signage, and in partner and donor communications. This is a key requirement in ensuring the visibility of TSET's mission in Oklahoma.

Funding Limitations

All funds must be awarded and used consistent with Oklahoma law. In addition, funds cannot be used to influence elections or an official's duties.

Overhead, administrative, or indirect costs may be allowable on a funded project and may not exceed 15% of the total award amount.

> ***Specific unallowable budget items include:***
> o   Pre-award costs
> o   Endowments
> o   Hiring of lobbyists
> o   Operating deficits or retirement of debt
> o   Items for which third-party reimbursement is available
> o   Entertainment costs for amusement or diversion
> o   Individual professional or personal memberships
> o   Staff time for fundraising efforts
> o   Cash/prize donations for fundraisers or events

This list is not exhaustive. Although all budgets will undergo review prior to issuance of a cooperative agreement, applicants with questions about potential budget items are encouraged to submit their

questions to TSET according to the process detailed in these guidelines prior to submitting an application. TSET reserves the right to deny funding for any budget items that are unallowable, inappropriate, or unrelated to the project.

Application Information

Applications will be accepted **April 15, 2025, through 12:00 pm CDT on June 16, 2025**. The process for application will be done in 3 stages. The overview of the 3 stage process is summarized below. Incomplete application(s) will not be reviewed.

If, after submission but before a submission deadline, an applicant realizes a mistake in or omission from their application, the applicant may notify TSET in writing of the desire to withdraw their submission. An email stating the intent to withdraw a submitted proposal must be sent to TSET at grantsmanagement@tset.ok.gov. The applicant may then resubmit the entire application package if the submission deadline has not passed.

Appendices and attachment forms provided in this RFA can be accessed by clicking the paperclip icon on the right navigation pane in Adobe. If you cannot see a paperclip icon, please ensure that you have fully downloaded this guide and have opened it from your desktop rather than from within your internet browser.

Applicants are strongly encouraged not to wait until the deadline to submit, as technical assistance cannot be guaranteed at the last minute.

Stage 1 -- Application Submission & Review

All applicants must submit the following information:

A. **TSET Application Cover Page (Attachment A)**

The page requests applicant organization and project information. Project information includes its purpose, amount of the funding request, proposed start and end dates, and project director contact information.

B. **An FY26-28 Application Narrative Template – (Attachment B)**

This page requests a high-level overview of the proposed FY26-28 project or program. See Attachment B, FY26-28 Application Narrative Template. Narratives are **limited to 3-pages** with at least 1/2-inch margins on all sides. Acceptable fonts include Arial and Times New Roman and should be no smaller than 11 points. Note: External information included in the narrative template to which the reviewer is directed to use hyperlinks included in the application text shall not be considered.

C. **Program Work Plan for Non-Capital Improvement Projects (Attachment C) OR Project Plan for Capital Improvement Construction Projects (Attachment D)**

If your proposed project/program does not involve a capital improvement or construction project, complete a work plan for <u>each year for requested funding</u>, including specific objectives, major project/program activities, an anticipated timeline from program startup to completion, as well as the responsible parties/stakeholders. See **Attachment C**, Annual Work Plan Template & Instructions, for guidelines to aid in preparing your work plan using TSET's template.

If your proposed project/program involves a capital improvement or construction project complete a project plan for <u>each year of requested funding</u>. See **Attachment D** for guidelines to aid in preparing your project plan using TSET's template.

D. **TSET Budget Worksheets (Attachment E)**
Complete a Summary Budget, a detailed Budget Justification for TSET funding and Match Justification (if matching funds will be utilized) sheet for <u>each year of funding</u> being requested. Include only matching funds that are confirmed at the time of application.

E. **Financial statements** documenting that the applicant organization has sufficient capital to sustain ongoing program services for up to six months while awaiting reimbursement from TSET. Documentation may include a quarterly bank statement from the most recent quarter, an audit report from the most recent fiscal year (including the auditor's letter or comments about the report), an income and expense report for the most recent six-month period, or similar documentation. **This requirement applies to the largest amount of funding requested within the three-year grant cycle.**

F. **Signed Letter(s) of Match Commitment (required only if matching funds are utilized)**
Signed letters of match commitment must be submitted for each organization that will be contributing **confirmed** in-kind or financial match towards the proposed project at any point during the grant cycle. Be sure that each letter includes:
- Role on the project
- Description of match being contributed
- Confirmed funding or in-kind match amount(s)
- Grant year that matching funds will be contributed
- Restrictions to their funding

This information is required for all organizations (including the applicant agency) contributing a match towards the proposed project. This information is not required if there is no match being contributed to the project.

G. **Appendices**
Appendices can provide supplemental, illustrative information that cannot be easily captured within the narrative sections of the application. Up to a total of ten (10) pages may be added as appendices material. Materials after page ten (10) will not be reviewed.

Stage 1 Application Submission

Applications and attachments must be submitted via Smartsheet **webform** by 12:00 pm CDT on Monday, June 16, 2025. The submission form may be accessed by **clicking here** or at: **https://app.smartsheet.com/b/form/bc47845e5a5d4294a336d60dab4471d2**. If after submission, but before the deadline an applicant realizes a mistake in or omission from their application, the applicant may notify TSET in writing via email to **grantsmanagement@tset.ok.gov** of the desire to withdraw the submitted application. The applicant may then resubmit their application and attachments if the deadline has not passed.

Stage 1 Review Criteria

Criterion	Considerations
Project Purpose, Overview and Project Service Area	The project aligns with TSET's constitutional mandates and priority areas as outlined in the funding opportunity, and is positioned to improve the health of Oklahomans. The response clearly explains the project, identifies whether it is a new or expanded initiative and provides context for the project's scope. The project is in an advanced stage of planning and is well-positioned to achieve significant milestones within the first year of the grant. The response clearly explains how the project will significantly transform and improve the health status of Oklahomans. Project's geographic service area and population(s) of focus are well-defined and encompasses a wide and broad reach. Populations benefitting from the proposed project were involved in the development and design of the proposed project. The applicant demonstrated that the proposed project will be available to all Oklahomans free of charge, according to a sliding fee scale, scholarships, or another proposed option. The project site and/or services will be available for public use during reasonable usage hours.
Project Goals	The project goals are clearly defined, SMART (specific, measurable, attainable, realistic, and time-limited), and are closely aligned with the purpose of the proposed project.
Project Outcomes and Key Performance Indicators	Proposed outcomes are clear, measurable and directly align with program goals and scope of work.

	The project is expected to deliver significant, measurable outcomes within the first 12 months of the grant.

The proposed outcomes are realistic and appropriate for tracking progress throughout the grant cycle, and are well-aligned with the project's resources, timeline, work plan, and overall scope.

Performance outcomes provide clear indicators of project success or areas needing improvement.

Key performance indicators are appropriate for measuring the success of the proposed outcomes.

Key performance indicators align with the project's goals and outcomes. Data collection tools and/or sources are clearly described and align with the proposed outcomes and key performance indicators.

Data sources and tools are appropriate and reliable for the performance metrics being measured. |
| **Work Plan or Project Plan** | **Work Plan:**

Each work plan aligns with the proposed scope of work, providing a comprehensive plan for monitoring grant progress and fulfilling the project's proposed goals.

Work plan aligns with work associated with TSET's constitutional mandates and priority areas as outlined in the funding opportunity.

The project is in an advanced stage of planning at the time of the application, and is positioned to begin directly serving the proposed population of focus within year one.

Objectives align with the proposed scope of work and are specific, measurable, achievable, relevant and time-bound.

Activities align with the proposed scope of work, are comprehensive, feasible and achievable within the time frame of the grant.

Timeline is detailed and includes clear and realistic deliverables and deadlines for all key activities, providing a comprehensive plan for monitoring progress of the project.

Plan clearly assigns responsibilities for every activity, ensuring accountability. |

	Work plan is fully detailed and includes all major work that will need to be accomplished for each year of requested funding.

Work plan aligns with the proposed budget.

Project plan:

Project plan aligns with work associated with TSET's constitutional mandates and priority areas as outlined in the funding opportunity.

The project clearly outlines a plan to achieve one or more significant construction milestones during the first year of the grant.

Plan is fully detailed, with clear and realistic project milestones, anticipated start dates and deadlines for all milestones, providing a comprehensive plan for monitoring progress and fulfilling the project's proposed goals.

Project milestones align with the proposed scope of work, are feasible and achievable within the time frame of the grant.

Plan clearly assigns responsibilities/tasks for every project milestone, ensuring accountability. Project plan includes work that needs to be accomplished for each year of requested funding.

Project plan aligns with the proposed budget. |
| **Budget Alignment** | Budget is realistic and feasible based on the scope of the proposed project.

Budget includes costs for a third-party evaluator.

Budget provides a clear breakdown of costs associated with the proposed project.

Budget line items include clear explanations to support the proposed expenses.

All budget categories (e.g., personnel, travel, supplies, strategic communication support, etc.) are justified in relation to the program's objectives.

Proposed expenses appear to be necessary and reasonable for achieving the goals and objectives of the proposed project.

If matching funds are included, they are clearly identified and appropriately integrated into the budget. |
| **Preference Criteria:** | Each match funding contributor is clearly identified, and it is clear how each funder will directly support the proposed project. |

	Project includes matching funds **and** signed Letter(s) of Match Commitment for each reported match dollar that has already been confirmed at the time of the application.
	Proposed project is launch ready with all planning, design, and permitting processes completed, and the project site is prepared for immediate or near-immediate construction.

Stage 1 Application Disqualification Criteria

Disqualification means that TSET will not review or consider the application further. Disqualification criteria includes:

- Not submitting electronically via Smartsheet web form.
- Not submitting by the due date and time indicated in this funding opportunity.
- Not meeting eligibility requirements.
- Not allocating money in the budget to work with a third-party evaluator.
- Not completing or submitting required forms in the funding opportunity package.
- Not submitting a detailed work plan or project plan for each year of proposed funding.
- Not submitting a summary budget and detailed justification for TSET funding and confirmed matching funds (if utilized) for each year of proposed funding.
- Submitting an application narrative that exceeds three pages.
- Submitting an application narrative that does not meet the font size and margin requirements indicated in the funding opportunity.
- Not submitting financial documents.
- Requesting funding that does not meet the minimum funding amount of $3 million for the life of the grant.
- Lacking program alignment with one of TSET's constitutional mandates.
- Lacking program alignment with TSET Legacy Grant's areas of emphasis to include rural health, healthcare access improvement, addressing data gaps, early prevention and/or enhancing quality of life
- Proposing a project that is either still in its conceptual phase or in the early stages of planning, **and** determined by TSET, not capable of producing significant outcomes within the first year of the grant.
- Proposing to serve a geographic service area outside the state of Oklahoma.
- A construction project being located on property that is not owned and/or operated by the applicant agency.
- A construction project being located on private property that is not accessible by the public.
- If claiming match, failure to submit Signed Letter(s) of Match Commitment that correspond to each confirmed matching dollar reported.
- Requesting funding to support an existing program, with limited plans for substantial expansion or growth as a direct result of TSET funding.

Stage 1 Checklist

Applicants are encouraged to use the below information as a checklist to ensure their application is complete when submitted for each stage.

❑ Complete the **TSET Cover Page (Attachment A)**

❑ Complete an **FY26-28 Proposal Narrative Template (Attachment B)**

❑ Complete a **Program Work Plan for Non-Capital Improvement Projects (Attachment C) <u>OR</u> Project Plan for Capital Improvement Construction Projects (Attachment D)**

If your proposed project/program does not involve a capital improvement or construction project, complete a work plan for <u>each year for requested funding</u>, including specific objectives, major project/program activities, an anticipated timeline from program startup to completion as well as the responsible parties/stakeholders. See **Attachment C**, Annual Work Plan Template & Instructions, for guidelines to aid in preparing your work plan using TSET's template.

If your proposed project/program involves a capital improvement or construction project complete a project plan for <u>each year of requested funding</u>. See **Attachment D** for guidelines to aid in preparing your project plan using TSET's template.

❑ Complete **<u>TSET Budget Worksheets (Attachment E)</u>** including a Summary Budget, a detailed Budget Justification for TSET funding and Match Justification (if matching funds will be utilized) sheets for <u>each year of funding</u> being requested. Include only matching funds that are confirmed at the time of application.

❑ Provide **financial statements** documenting that the applicant organization has sufficient capital to sustain ongoing program services for up to six months while awaiting reimbursement from TSET. Documentation may include a quarterly bank statement from the most recent quarter, an audit report from the most recent fiscal year (including the auditor's letter or comments about the report), an income and expense report for the most recent six-month period, or similar documentation. **This requirement applies to the largest amount of funding requested within the three-year grant cycle.**

❑ Provide **Signed Letter(s) of Match Commitment, if applicable,** for each organization that will be contributing in-kind or financial match towards the proposed project at any point during the grant cycle. Include only matching funds that are confirmed at the time of application. This information is required for all organizations (including the applicant agency) contributing a match towards the proposed project. This information is not required if there is no match being contributed to the project.

❑ Provide **appendices, if applicable**

❑ Review the **TSET cooperative agreement Terms and Conditions (Appendix E)**

❑ Upload the application and attachments **by 12:00 pm CDT on June 16, 2025** to **https://app.smartsheet.com/b/form/bc47845e5a5d4294a336d60dab4471d2**.

Stage 2 -- Invitation to Present & Request for Additional Information

If selected, organizations will receive an invitation by September 12, 2025, to present at a TSET Special Board Meeting on October 27 and 28, 2025. Invited applicants are required to submit the following documents by 12:00 pm CDT on October 15, 2025, to https://app.smartsheet.com/b/form/ca04d9dfea964186b521cb67900254e6. Note: this link will become active on September 12, 2025 after eligible applicants receive invitations to submit Stage 2 documents.

   A. **PowerPoint Presentation (Attachment F)**
      Using the Legacy Grant Stage 2 Slide Deck PowerPoint Template provided in **Attachment F**, prepare and submit a presentation for the TSET Board of Directors. The presentation should be no longer than 20 minutes.

   B. **Organization's Signed and Dated Comprehensive Tobacco Free Workplace Policy,** which meets the minimum requirements set forth in **Appendix B**, Tobacco-free Policy Template. See **Appendix C**, Sample Tobacco-free Policies and Checklists, for optional additions to the minimum policy requirement.

   C. **Organization's Signed and Dated Workplace Wellness Policy.** See **Appendix D**, Sample Workplace Wellness Policy and Instructions, for sample policies.

   D. **Signed Non-Acceptance of Tobacco Funds Certification (Attachment G)**
      All applicants will be required to certify that the organization will neither have a direct or indirect affiliation or contractual relationship with a company or foundation engaged in or funded by the manufacture of tobacco, tobacco products, and/or electronic nicotine delivery systems (ENDS), nor will it accept any type of funding from such a company or foundation.

   E. **Signed TSET Workers Compensation Insurance Coverage Certification (Attachment H),** **including** copy of Workers' Compensation Insurance Coverage or statement of exemption.

Stage 2 Proposal Submission

Documents must be submitted via Smartsheet webform before 12:00 pm CDT on Wednesday, October 15, 2025. The submission form may be accessed by **clicking here** or at: **https://app.smartsheet.com/b/form/ca04d9dfea964186b521cb67900254e6**. Note: this link will become active on September 12, 2025 after eligible applicants receive invitations to submit Stage 2 documents. If, after submission but before the deadline an applicant realizes a mistake in or omission from their submission, the applicant may notify TSET in writing via email to **grantsmanagement@tset.ok.gov** of the desire to withdraw the submission. The applicant may then resubmit their documents if the deadline has not passed.

Stage 2 Presentation Review Criteria

Criterion	Considerations
Applicant Capacity	Applicant organization has relevant experience required to implement the proposed project. Applicant organization has experience serving the proposed geographic service area and population(s) that will benefit from the proposed project.
Project Overview	The proposed project aligns with TSET's mission and priority areas. Proposed project is clearly articulated and demonstrates strong potential to reduce the leading causes of death related to cardiovascular disease and cancer. The proposed project aligns well with the TSET Legacy Grant funding criteria. The proposed project includes clear, measurable goals and objectives that are: - easy to understand, - align with the project's scope, and - effectively demonstrates the project's potential for success (e.g., number of people served, improved outcomes, cost savings).
Populations Benefitting from Project	The proposed project has the potential to make a meaningful impact on the geographic area and populations it is designed to serve. Populations benefitting from the proposed project were involved in the development and design of the proposed project. The applicant demonstrated that the proposed project will be available to all Oklahomans free of charge, according to a sliding fee scale, scholarships, or another proposed option. If a non-capital improvement project is proposed, the applicant demonstrated that the project will begin serving the identified populations of focus within the first year of the grant. If a capital improvement/construction project is proposed, the applicant has demonstrated that the general public will have access to and be able to use the project site during reasonable hours of operation.
Project Implementation and Logistics	Proposed project activities directly align with the project goals and contribute to achieving the desired outcomes.

	The proposed activities are realistic given the available resources, timeline, and budget.
	Key partners or collaborators are identified, and their role in the project well-defined.
	The applicant has outlined a clear plan to acknowledge TSET's funding and support throughout the duration of the grant cycle, aiming to enhance both the visibility of the project and TSET's contribution.
Project Impact	The project is expected to deliver significant, measurable outcomes within the first 12 months of the grant.
	The proposed project is cost-effective, meaning it delivers significant outcomes for the resources invested.
	Proposed evaluation methods are feasible, align with the project goals/objectives and are appropriate for measuring success.
	A third-party evaluator has been identified to evaluate the proposed project.
Project Sustainability	The applicant outlined a plan for how the project's impact will continue beyond the grant period (e.g., through policy change, ongoing support, or partnerships).
	The applicant outlined a strategy for securing additional funding or resources after the grant period ends.
	The applicant demonstrated a long-term commitment to the project through leadership, staffing, and resources beyond the grant period.
Presentation Quality	The presentation was clear, well-organized, easy to follow and is aligned with the template provided by TSET.
	The presenter was able to communicate the proposed project and technical details.
	Presenters were able to effectively manage their time, covering all key points without rushing or running over time.
	The presenter was able to demonstrate a strong understanding of the project's goals and propose outcomes.
	The presenter was able to communicate the proposed project's value and impact clearly.
	The presenter was able to respond to questions thoughtfully and effectively, demonstrating a clear understanding of the project and its details.

Stage 2 Application Disqualification Criteria

Disqualification means that TSET will not review or consider the application further. Disqualification criteria includes:

- Not submitting electronically via Smartsheet web form.
- Not submitting by the due date and time indicated in this funding opportunity.
- Not completing or submitting required forms in the funding opportunity package.
- Not submitting a PowerPoint presentation slide deck.
- Requesting funding that does not meet the minimum funding amount of $3 million for the life of the grant.
- Lacking program alignment with one of TSET's constitutional mandates.
- Lacking program alignment with the Legacy Grant's areas of emphasis to include rural health, healthcare access improvement, data gaps, early prevention and/or quality of life improvements.
- Proposing to serve a geographic service area outside the state of Oklahoma.
- Requesting funding to support an existing program, with limited plans for substantial expansion or growth as a direct result of TSET funding.
- Not submitting a signed and dated tobacco-free policy.
- Not submitting a tobacco-free policy that covers all required policy requirements.
- Not submitting a signed and dated wellness policy.
- Not submitting a signed Non-Acceptance of Tobacco Funds Certification
- Not submitting a TSET Workers Compensation Insurance Coverage Certification including a copy of Workers Compensation Insurance Coverage or statement of exemption.
- Submitting presentation materials that deviate from the application narrative submitted in Stage 1.

Stage 2 Checklist

Applicants are encouraged to use the below information as a checklist to ensure their application is complete when submitted for each stage.

- ❑ Prepare **PowerPoint Presentation (Attachment F)**
  Using the Legacy Grant Stage 2 Slide Deck PowerPoint Template provided in **Attachment F**, prepare and submit a presentation for the TSET Board of Directors. The presentation should be no longer than 20 minutes.

- ❑ Submit the **Organization's Signed and Dated Comprehensive Tobacco Free Workplace Policy,** which meets the minimum requirements set forth in **Appendix B**, Tobacco-free Policy Template. See **Appendix C**, Sample Tobacco-free Policies and Checklists, for optional additions to the minimum policy requirement.

- ❑ Submit the **Organization's Signed and Dated Workplace Wellness Policy.** See **Appendix D**, Sample Workplace Wellness Policy and Instructions, for sample policies.

- ❑ Complete **Non-Acceptance of Tobacco Funds Certification (Attachment G)**

- ❑ Submit a **Signed TSET Workers Compensation Insurance Coverage Certification (Attachment H),** <u>including</u> a copy of Workers' Compensation Insurance Coverage or statement to exemption.

- ❑ Upload the attachments by 12:00 pm CDT on October 15, 2025, to https://app.smartsheet.com/b/form/ca04d9dfea964186b521cb67900254e6. Note: this link will become active on September 12, 2025 after eligible applicants receive invitations to submit Stage 2 documents.

Stage 3 -- Consideration for TSET Board of Directors Approval and Award

Presentations selected from the TSET Special Meeting may be moved forward to the regular TSET Board Meeting on November 20, 2025, for potential funding recommendation(s).

- Selected applicants are encouraged to attend the November 20, 2025 regular TSET Board Meeting in case there are any further clarification questions from the Board.
- Organizations with approved applications by the TSET Board of Directors will be contacted by TSET Grants Management to begin negotiations on final contract documents.
- Awarded applicants are expected to begin work in FY2026 (July 1, 2025 – June 30, 2026) on January 1, 2026.

Questions

Questions about this funding opportunity must be submitted in writing via the TSET website by **clicking here** or at https://oklahoma.gov/tset/funding-opportunities/other-funding-opportunities.html. Answers will be posted on the same TSET webpage on the following Wednesdays: April 30, May 14, and May 28, June 4, 2025. Questions received after 4:00 PM on May 23, 2025, may not receive a response.

Technical assistance with any documents associated with the proposal may be submitted to **grantsmanagement@tset.ok.gov.**