Recovery-to-Work Cohort Learning Academy Final Report

Development District Association of Appalachia, August 2021

For many years, substance use disorder (SUD) has been a major crisis in the Appalachian region. As far back as 2008, studies commissioned by the Appalachian Regional Commission (ARC) found that opiate treatment rates in Appalachia were both greater than the rest of the country and growing at a faster rate.[1] ARC sought ways to address the crisis in its capacity as an economic development organization and also utilize the unique capabilities of local development districts, ultimately developing the concept of the "recovery-to-work ecosystem". The ecosystem concept involves the regional coordination of recovery services, workforce training, and employment to help individuals with SUD to achieve lasting employment.

In 2019, the Development District Association of Appalachia (DDAA), a membership association for local development districts (LDDs), received a grant from ARC to strengthen recovery-to-work ecosystems through a Cohort Learning Academy. The Academy, held from March 2020 to April 2021, offered four teams of local development districts and other regional stakeholders expert facilitation and peer networking opportunities to guide the development and implementation of action plans to strengthen their ecosystems. DDAA facilitated and documented the development of recovery-to-work ecosystems in communities throughout Appalachia in the Learning Academy, supporting the participating LDDs throughout their journey by providing access to expertise, coaching, and recognition. DDAA also documented Learning Academy best practices and processes that could be emulated by other Appalachian LDDs to provide a roadmap on how to build a long-standing ecosystem designed to help area residents move from recovery to work.

Local development districts are uniquely positioned as regional networks that bring together municipalities and counties to solve public challenges through collaboration. This means that they can serve as leaders and participants in the recovery-to-work process in several roles. First, LDDs can provide leadership by identifying and convening key partners. In addition, they can serve the recovery-to-work

---

[1] Zhang, Z., Meit, M., Infante, A., English, N., Dunn, M., & Bowers, K. H. (2008). *An Analysis of Mental Health and Substance Abuse Disparities & Access to Treatment Services in the Appalachian Region*. Retrieved from *https://www.norc.org/PDFs/Walsh%20Center/AnalysisofMentalHealthandSubstanceAbuseDisparitiesFinalReport.pdf*.

ecosystem by identifying resources to fill gaps in the ecosystem. Further, LDDs are structured as economic development organizations, often providing a natural connection to employers and the workforce development system.

LDDs feature talented staff with multifaceted skillsets and close relationships with local governments and service providers, but they tend to lack expertise in recovery-to-work ecosystem development and facilitation (as a fairly new model, it might be fairer to say that there has been little time for experts to emerge in this field). Substance abuse and addiction have significant impacts across political boundaries and the answers require resources that few individual communities can muster.

Once each region was accepted into the Cohort Learning Academy, their representatives met with DDAA facilitators and with the rest of the participating regions as a group to develop their action plans and share experiences. Of course, COVID-19 disrupted the project significantly, as lockdowns began only days before the kickoff meeting was scheduled to begin in March 2020. While the inability to meet in person made collaboration more difficult due not only to a switch to virtual meetings but also to the time that each team had to devote to pandemic crisis management, DDAA was able to keep the group together through webinars, joint Zoom sessions, and educational material until participants could re-focus on the project.

The Cohort Learning Academy model was well suited to supporting this work for several reasons. First, the process of developing a proposal to participate in the Learning Academy inspired regions to think critically about the state of the problem locally. Academy participants considered what their region needed to do to address that problem and identified key stakeholders that ought to work together to meet those needs. Second, the Learning Academy provided regions with expert facilitators who brought an outside perspective to ecosystem development and helped structure the process of coordinating regional stakeholders, creating relationships and committee structures that can outlive the duration of the Learning Academy process. Finally, regions learned from their peers who are engaging in similar work and facing similar challenges.

Establishing the Cohort Learning Academy

Given how pervasive substance use disorder is throughout the nation and especially within Appalachia, DDAA developed criteria to determine both whether regions were prepared to undertake the Cohort

Learning Academy process operationally, and whether they were able to articulate their needs and challenges. DDAA had an interest in regions with a demonstrated commitment to developing a more comprehensive ecosystem to address the challenges, especially for those in long-term recovery. In December 2019, DDAA issued a Request for Proposals (RFP) for participation in the Recovery-to-Work Cohort Learning Academy via postings on the DDAA website, with periodic announcements and notifications made in newsletters and email blasts through these same networks.[2] DDAA then held a prospective bidders' webinar on to help regions prepare for the January 15, 2020 proposal deadline.

The RFP required one or more LDDs serving some part of the 420 counties of the Appalachian Regional Commission to both sponsor the proposal and serve on the "core team" of four organizations participating in the project that receive concentrated facilitation. The core team was expected to travel to joint meetings of the four participating networks engaged with the Learning Academy (although this requirement was relaxed in 2020 due to public health concerns associated with COVID-19). The RFP also required the identification of a broader set of organizations to serve on the "home team" – a stakeholder and partner group that agreed to meet within the region to provide feedback on and implement the core-team-developed action plans.

Proposal evaluations recognized both ARC's and the LDD's emphasis on identifying and sharing solutions to substance use disorders (SUD) and the desire to leverage the capabilities and partnerships of LDDs as key facilitators in supporting these emerging networks. Proposals were also evaluated on how well they addressed:

1. The presence of energetic individuals who want to serve as project champions (i.e., a "core team"), including demonstrated engagement of the LDD;
2. A documented synopsis of local need and the nature of the substance abuse crisis in the LDD's region;

---

[2]https://www.appalachiandevelopment.org/professional-development/building-an-effective-recovery-to-work-ecosystem/

3. Experience in undertaking efforts to foster addiction recovery and efforts to support participants through the job search and placement process that could be used as a potential foundation on which to build the ecosystem;

4. A clear sense among the core team's champions of how an external advocate (such as ARC, other federal agencies, regional leaders, and/or other partners) might help them move forward;

5. Demonstration that the region has made some past progress toward developing aspects of the Recovery-to-Work ecosystem;

6. A preliminary assessment of how well existing Recovery-to-Work efforts are faring in accomplishing their goals; and

7. Demonstrated external support for Recovery-to-Work efforts.

In late February 2020, DDAA announced the selection of the four regions participating in the Recovery-to-Work Ecosystem Cohort Learning Academy. The Ohio Valley Regional Development Commission (Waverly, OH); Southern Tier 8 Regional Board (Binghamton, NY); Upper Cumberland Development District (Cookeville, TN); and a joint team that included Mid-Ohio Valley Regional Council (Parkersburg, WV) and Buckeye Hills Regional Council (Marietta, OH) led the four selected teams. A panel of DDAA, ARC, and non-submitting LDD experts reviewed and scored each proposal.

Cohort Learning Academy Activities

Kicking Off the Learning Academy and Keeping Momentum

Once regions were notified of their acceptance into the Recovery-to-Work Cohort Learning Academy, DDAA facilitators began preparing their regions for the Learning Academy process including introductory calls with core team members. DDAA then held a kickoff teleconference for core team members on February 20, 2020, to introduce core team members to each other and provide additional information on the Learning Academy process. Due to restrictions caused by COVID-19, DDAA cancelled the introductory meeting (originally planned for March 18-19, 2020 in Arlington, VA) and converted the meeting content into a series of core team calls and webinars over several weeks, featuring speakers from several disciplines. Speakers included:

- April 14, 2020 - Jeff Schwartz, Appalachian Regional Commission

- April 21, 2020 - Betty-Ann Bryce, US Office of National Drug Control Policy

- April 30, 2020 - Heather Schimke and John Tucker, Solid Comfort

- May 5, 2020 - Tara Kunkel, Rulo Strategies

- May 18, 2020 - Jesse Battle, TROSA and Kayla Parsons, Addiction Recovery Care

- August 11, 2020 - Tom Barkin, Federal Reserve Bank of Richmond

DDAA facilitators arranged a presentation and conversation with Solid Comfort, a manufacturer headquartered in Fargo, ND that has extensive experience in hiring individuals with substance use disorder. They shared their strategies and practices for developing an inclusive "Solid Start" workplace culture. Representatives from the company shared their Solid Start Hiring Rubric with Learning Academy team members to help them better understand how businesses evaluate potential recovery-to-work hires. Two organizations, Addiction Recovery Care and Triangle Residential Options for Substance Abusers, Inc. (TROSA), gave presentations on substance use disorder's effects on individuals and tactics and toolkits for reducing addiction-related stigma. Sonia Tillman of the Ohio Department of Jobs and Family Services discussed Ohio's toolkit[3] for supporting those with SUD and the RecoveryOhio Advisory Council.[4]

Federal partners shared important initiatives, reports, insights, and funding opportunities with the teams. For instance, Betty-Ann Bryce of USDA Rural Development discussed with the group federal resources available for rural communities to help address substance use disorder. Bryce also shared findings and best practices in building stronger, healthy, drug-free rural communities based on its Rural Community Action Guide.[5] A former grant reviewer from the U.S. Department of Justice (now Rulo Strategies), Tara Kunkel offered guidance on effective grant writing to support team projects. Tom Barkin, President of the Federal Reserve Bank of Richmond, participated in a Digital Town Hall organized for the Academy Teams – with others across the region invited. Fed President Barkin shared his perspectives on the economy and prospects for recovery.

---

[3] https://crecstorage.blob.core.windows.net/ddaa/sites/6/2021/04/Office-of-Workforce-Development-Opioid-Toolkit-7.1.19.pdf

[4] https://governor.ohio.gov/wps/portal/gov/governor/media/news-and-media/031419a

[5] https://www.usda.gov/sites/default/files/documents/rural-community-action-guide.pdf

Most importantly, the Appalachian Regional Commission has been a valued partner and active participant with the Academy Teams. ARC's Jeff Schwartz met with the Learning Academy to discuss promising practices and efforts underway in the region to build Recovery-to-Work ecosystems. Examples included:

- Community Kitchen Pittsburgh (Pittsburgh, PA): Culinary training focusing on released prisoners, a large proportion of which are recovering from SUD.
- PRIDE Community Services (Logan, WV): BuildJobs Initiative focusing construction training on tiny homes. The homes are used as sober living facilities and many of their trainees are current residents and others in SUD recovery.
- Morgantown Sober Living Inc. (Morgantown, WV): Reintegrate Appalachia is a long running job creation program with partnerships including businesses and newly created social enterprises that provide short- and long-term employment and training.
- Southwest Virginia Workforce Development Board (Lebanon, VA): Recovery Opportunities and Pathways (R.O.P.E.S.) links various providers in Southwest Virginia into an ecosystem web.
- Tri-County Technical College (Pendleton, SC): Development of a national-credential-based Heavy Equipment Operator training program to build on an existing Commercial Driver's License program and targeting specific disadvantaged populations for training.
- Helen Ross McNabb Center (Morristown, TN): With a focus on women in prison for SUD related issues, they work with the court system to secure early release into their sober living facility and provide rehab, training, and job placement assistance.

Parallel to these sessions with experts on the SUD recovery process, DDAA held monthly virtual sessions with core team members and team leads to share progress and best practices among their peers in the Learning Academy.

Grant Writing Training and INSPIRE

Core team members demonstrated interest in continued support for their recovery-to-work efforts, even in the early stages of the pandemic's disruptions. In response, DDAA developed "Grant Writing Essentials for Local Development Districts", a virtual instructor-led training consisting of 13 live and recorded webinar sessions, assignments, and resources provided to help Learning Academy members identify and

write winning grant proposals to support their work. Key to this interest was the anticipated, but as then unannounced, INvestments Supporting Partnerships in Recovery Ecosystems (INSPIRE) Initiative from ARC, a $10 million program providing implementation grants of up to $500,000 and planning grants of up to $50,000 to support recovery-to-work ecosystem development. Once ARC announced the initiative, DDAA facilitators continued to provide support and counsel to core teams to help them refine their proposal ideas for proposal responses to the INSPIRE Initiative. By the end of the Learning Academy, all four participating regions were awarded INSPIRE implementation grants for projects developed from the planning work conducted by their respective teams.

Learning Communities

After each region submitted their INSPIRE Initiative proposals to the Appalachian Regional Commission, DDAA held a series of virtual Learning Community events. These calls were opportunities for Cohort team members to meet with Learning Academy peers and partners to discuss challenges, best practices, needs, and opportunities for collaboration and technical assistance. Each Learning Community was led by a Learning Academy facilitator and often included presentations from subject matter experts on a variety of subjects, including:

- **February 16, 2021 - Employer Engagement:** Recovery-to-work ecosystem leaders face challenges in recruiting employers to join efforts to hire and retain workers with SUD – and employers need to see the business case for hiring and retention. This session identified ways regions can support businesses, chambers of commerce, recruiters, etc., to develop a pitch for hiring and retention and share the stories of successful employers.
- **February 24, 2021 – Transportation:** Workers recovering from SUD often lack funds for basic transportation to their jobs, treatment, parole, or other commitments. Rural areas face challenges in providing public transportation, which makes both consistent transportation access to employment and travel for intermittent appointments difficult. This session discussed how regions can offer or support affordable, consistent, and reliable transportation to recovering workers.
- **March 2, 2021 – Housing:** Housing is a nationwide challenge, and rural areas have deep and unique challenges. Identifying transitional and permanent housing for recovering workers

compounds these challenges. This session discussed how regions can deliver affordable and dependable housing to recovering workers and their families.

- **March 16, 2021 - Employer Resources:** Employers oftentimes see hiring and retaining workers with SUD as risky. This session discussed various measures to alleviate employer concerns by sharing human resource policies, on-site support models, and risk assessments.

Concluding the Cohort Learning Academy

DDAA finished the Cohort Learning Academy with a two-hour virtual session in April 2021. The goal of the meeting was to celebrate the work accomplished over the course of the Learning Academy, share insights and lessons learned, and plan for sustainability and continued collaboration. Learning Academy activities across the regions include improved collaboration, better ways to connect employers and workers with resources, and new programs and policies. Regional teams shared insights about what they accomplished, what they learned, and how it will affect their regions – reflecting on the year through a set of guided questions.

The (now former) Federal Co-Chairman of the Appalachian Regional Commission, Tim Thomas, joined the meeting to reiterate his passion for the work of the Cohort Learning Academy and encourage regions to maintain their commitment to building their recovery-to-work ecosystems. The final meeting also featured insights from experts representing the federal government, foundations, and employers:

- Betty-Ann Bryce, Rural Health Liaison, U.S. Dept. of Agriculture
- Renee Steffen, Executive Director, Sisters Health Foundation
- Sonia Tillman, Project Manager, ODJFS - Office of Workforce Development

Prior to the final meeting, each region created a video reviewing their accomplishments and reflections related to their experiences with the Learning Academy.[6] Those videos were posted on the DDAA SUD resource page.

---

[6] https://www.appalachiandevelopment.org/recovery-to-work-cohort-learning-academy-recap/

COVID-19 Impacts on the Learning Academy Process

COVID-19 had significant and unexpected impacts on the region, and it affected how the Cohort Learning Academy proceeded as well. LDD shutdowns and priority shifts, travel restrictions, and limitation on the size of allowable public gatherings required the cancellation of a key introductory in-person core team meeting at the start of the Cohort Learning Academy. COVID-19 restrictions also limited the ability of core team members to engage locally with home team partners committed to the Cohort Learning Academy and made travel for site visits inadvisable. This resulted in the need to make significant changes: adapting project plans, eliminating travel, and converting planned meetings from in-person to virtual.

In the process of reorienting the Cohort Learning Academy in response to these difficulties, DDAA:

- Produced a series of virtual cross-agency working group sessions;
- Organized and delivered several supplemental webinars featuring subject matter experts;
- Developed a virtual instructor-led training on grant writing to help teams apply for funds to support the implementation of items from their action plans;
- Held many more virtual meetings than initially planned to provide more hands-on assistance to cohort home teams than originally planned; and
- Provided other technical assistance (e.g., supporting local virtual events, conducting research on key issues, and initiating introductions to national experts to support local efforts).

During this process, it became clear that COVID-19 challenges were impacting the substantive work of the participants of the Learning Academy and the people they serve. It expanded the workload of Learning Academy partners involved in mental health treatment. For instance, lockdowns caused widespread mental health issues and increased substance abuse.[7] Learning Academy team members experienced significant budget shortfalls caused by diminished sales tax revenue available to their state or local government sponsors. Employers had challenges with local or national demand for their products and services, and some were furloughing workers temporarily or permanently, so they were in no position to

---

[7] *Czeisler MÉ , Lane RI, Petrosky E, et al. Mental Health, Substance Use, and Suicidal Ideation During the COVID-19 Pandemic — United States, June 24–30, 2020. MMWR Morb Mortal Wkly Rep 2020;69:1049–1057. DOI: http://dx.doi.org/10.15585/mmwr.mm6932a1external icon*

hire workers in recovery. As the economy moved out of lockdown and companies began to re-open in the early summer, Learning Academy partners were able to re-engage with the process, but their goals and strategies were shifting to reflect new economic realities.

Facilitated Mentoring

As illustrated in their work with cohort participants during the early stages of the pandemic response and in preparing project ideas for the INSPIRE Initiative, DDAA facilitators were key to the success of the Learning Academy. Their individualized guidance to each regional team enhanced the process and improved the resulting outcomes. DDAA assigned two facilitators to work with each region: the principal facilitators had extensive experience in prior unaffiliated learning academies, while the second co-facilitators served as a project coordinator to provide research and technical support. The team of eight facilitators supporting the four regions worked together to develop meeting and training agendas, share information, identify effective best practices that can inform strategies, and generate ideas to better engage core and home team participants across the regions.

All eight facilitators were experienced professionals drawn from DDAA staff and consultants who have worked with other learning academy efforts and/or offered expertise in several relevant disciplines, including economic and workforce development, labor market and economic information, rural strategies, community engagement and facilitation, as well as program management at the federal, state, and local government. DDAA connected the Learning Academy with experts in relevant fields such as substance use disorder treatment, related grant programs, and other similar efforts to provide additional support and advice on an as-needed basis. In addition, given the important role of DDAA in this effort, the facilitators were experienced in working with several associations to leverage similar opportunities across Learning Academy participants and the broader DDAA membership.

The facilitators worked with the regional teams in a variety of ways to enhance the process and outcomes. The facilitators:

- Assisted in developing action plans to guide work during the Academy, including aligning goals, strategies, and specific actions to achieve defined priorities for the region;

- Provided counsel regarding engagement of partners, including managing participation of core team members and enlisting support from the home team participants and other partners as needed;

- Advised on identifying and articulating core team activities effectively to capture lessons from the process and outcomes for sharing with other Academy regions, ARC, and other stakeholders;

- Supported efforts to define roles and responsibilities of different members of the core team, home team, and other partners in advancing progress on the action plan; and

- Informed discussions about the pursuit of complementary funding opportunities from ARC and other sources, with a focus on exploring how to leverage participation in the Academy to maximize internal and external benefit.

In the first quarter of the Academy, facilitators largely focused in two areas: 1) helping the region translate their proposed activities into the action plan and 2) ascertaining how proposed plans should be adjusted given the impact of COVID-19. During the second quarter, the facilitators provided insights and counsel on other federal funding opportunities that the region might consider. Specifically, opportunities for funding arose from a competition with ARC collaborating with US Department of Labor's Employment and Training Administration (the Workforce Opportunity for Rural Communities, or WORC, initiative) and later from the ARC INSPIRE Initiative. In both cases, facilitators helped regional leaders consider strategies, focus areas, and how federal funding might accelerate components of the action plans developed by core and home teams.

In the second half of the Academy, the focus shifted toward more aggressive implementation of the action plan and sharing best practices in areas where all four regions faced challenges. These challenges included housing, transportation, employer engagement and support, workforce system engagement, and sustainability.

Facilitators generally engaged with the Core team lead and other core team members regularly and participated in periodic (often bi-weekly) calls among each region's core team members to discuss plans and progress against goals. The focus of these interactions changed over time. Initially, the discussions focused on better understanding the region's characteristics, strengths and weaknesses and the region's proposed activities for the duration of the Learning Academy.

Gradually, that evolved into discussions about specific action plans for each region, moving the general goals cited in respective Learning Academy applications to more specific actions (including goals, strategies, actions, responsible parties, and due dates) designed to make progress against the agreed-upon goals. In addition, the facilitators worked with core team members to engage and encourage participation of a broader set of local stakeholders, to include the region's home team and others as appropriate, to shape the details of the action plan and its implementation, and to help each region to move from planning to implementation. The facilitators were a critical element of helping each region articulate their vision, translate that vision into action, and maintain momentum in truly unique times.