Appalachian Regional Commission Strategic Plan: Synthesis Report

July 2021

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Executive Summary

In the Spring of 2021, the Appalachian Regional Commission (ARC), in partnership with Maher & Maher, embarked on a series of stakeholder engagement activities. The purpose was to gather input regarding the strengths, challenges, and opportunities facing the Region, along with ideas for strategies and solutions to advance economic prosperity. That input will provide the framework for and inform the content of ARC's Region 2022 - 2026 Strategic Plan.

This report outlines the process undertaken to gather that input as well as the crosscutting takeaways, themes and sub-themes that emerged across the stakeholder activities. Highlights of each are outlined below and provided in greater detail in the full report.

Stakeholder Engagement Process: Stakeholder engagement was gathered through a survey with over twelve hundred respondents, six community conversations that included facilitated discussion through small breakout sessions, and sixteen focus groups. The focus groups targeted both specific ARC stakeholders, as well as groups of subject matter experts in key areas and are listed below:

- Historically Black College and University (HBCU) Presidents
- Intermodal Transportation
- Development District Association of Appalachia (DDAA) Board and Local Development Districts (LDDs)
- Tourism
- Entrepreneurship
- Health
- Youth (2 groups)

- Broadband
- Philanthropy
- Substance Abuse
- ARC Leadership Institute
- Economic Development
- Water/Sewer
- Non-Profits
- Community Colleges of Appalachia (CCA)

Crosscutting Takeaways: Synthesis of the input gathered through the stakeholder engagement process produced clear crosscutting takeaways that provide insight into the current landscape of the Region as it continues to respond to and recover from the economic, health, and social impacts of the COVID-19 pandemic. These crosscutting takeaways include:

- Appalachia is a multifaceted, varied Region where place matters. This requires locally tailored solutions to meet the needs of local communities.

- The pandemic both highlighted and exacerbated the depth and breadth of all of the challenges in the Region.

- Access to reliable, affordable broadband is a cross-cutting theme as well as an equity issue viewed as essential to improving the lives of Appalachians.

- A singular focus on job creation does not fix or address underlying challenges (generational poverty, lack of internet access, etc.) faced by some areas of Appalachia.

- Stakeholders prefer growing their own jobs through entrepreneurship and small business development rather than the traditional approach of business recruitment and new job creation.

- Greater community building and technical assistance are needed to support jurisdictions within the Region as they pursue, receive, and manage federal (and other) funding.

- Stakeholders emphasized leveraging, prioritizing, and scaling ideas and solutions that are developed within the Appalachian Region.

- There was mixed feedback on ARC's role as a convener – some encourage ARC to further step into this role while others would prefer to see ARC support the capacity of local stakeholders to bring groups in their communities to the table.

- There are opportunities and interest in applying an equity lens at all levels (ARC, state, local) of planning.

Themes and Sub-Themes: In addition to the takeaways that emerged consistently across the various stakeholder engagement activities, clear categories or themes were identifiable through the synthesis process, as well as sub-themes that provide more detail and nuance regarding strengths, challenges, opportunities, and possible solutions. Many of these sub-themes align with ARC's current strategic plan, while others reflect a "2021 lens." Those themes and sub-themes are outlined below.

- Regional culture and quality of life

    - Sub-themes include population decline vs. growth; quality of life and cost of living; low labor force participation; quality of jobs; generational poverty; culture and arts heritage, natural assets and traditions; and community character, cohesion and changing the narrative

- Entrepreneurship and small business development

    - Sub-themes include planning and economic development strategies; economic diversification and growing local industries; entrepreneurship; financing and other business support systems; downtown/main street; geography, location, and transportation infrastructure; and remote work

- Talent and skill development

    - Sub-themes include jobs/skills/workers mismatch, educational opportunities that lead to employment, and diverse workforce and equitable workforce opportunities

- Employment supports

    - Sub-themes include childcare, housing, transportation to support employment, and a healthy workforce

- Infrastructure

    - Sub-themes include general infrastructure planning, development readiness, and impact; energy (electric, heat, oil, gas, and alternative energy); water, wastewater and septic; digital infrastructure (broadband and telecommunications); transportation (roads, highways, public and personal transit); overall intermodal transportation; and waste management

- Natural assets

    - Sub-themes include sustainable economic diversification and growth; natural resources and recreation and tourism; environment/climate, green economy, energy and renewable energy; and sustainability and protecting the environment

- Leadership, capacity building, planning support, and funding opportunities

    - Sub-themes include leadership, partnerships, and collaborative solutions; capacity building, strategic planning, technical assistance and research; and funding opportunities

- Health

    - Sub-themes include health and healthcare, substance abuse and the mental health ecosystem, and food access

- Equity

    - Sub-themes include insufficient data and inequitable systems, intentional and inclusive engagement, and programs and funding

- ARC Roles, Processes, Requirements and Metrics

    - Sub-themes include programming and overall support; technical assistance, project development, capacity building and research; outreach, community engagement, and representative voice; processes and requirements; planning and input process; and metrics, measures of success, and evaluation
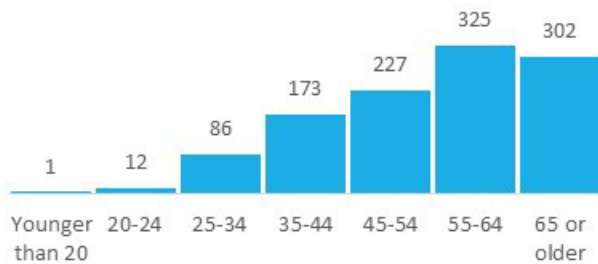
Overview of the Stakeholder Engagement Process

As part of the process to develop a new strategic plan to guide ARC's activities and investments for Fiscal Years 2022–2026, stakeholders were invited to provide input on the Region's opportunities and needs in a number of ways. ARC conducted outreach to the general public, inviting Appalachians to take a survey as well as participate in virtual conversations. Smaller groups of experts were invited to participate in targeted, thematic focus groups.

1,250 responded to survey

473 attended six community conversations

158 participated in 16 focus groups

Survey

ARC launched the survey through their newsletter, using social media to increase response rates. 1,250 Appalachians responded to the survey. Respondents rated their priorities for the Region and provided hundreds of open-ended comments which were incorporated into the synthesis process. Respondents were also asked to identify their top strengths and challenges. Respondents noted that the Region's greatest strengths include its location; natural resources and related recreation and tourism opportunities; sense of community; people; and low cost of living. Unemployment and job loss, business closures, and lack of broadband were the most urgent pandemic-related challenges, while long-term challenges were inadequate infrastructure, lack of well-paying jobs, and limited education opportunities.

Top Strengths

Most Immediate Pandemic-Related Challenges

Top Long-Term Challenges

Familiarity with ARC

Approximately 90% of survey respondents were familiar with ARC's role in sharing news and events about Appalachia along with ARC's grant opportunities, research, and data. However, many were not at all familiar with the technical assistance that ARC provides (31%) or with its programming and services (43%). Nearly 40% of survey-takers were engaging with ARC for the first time.
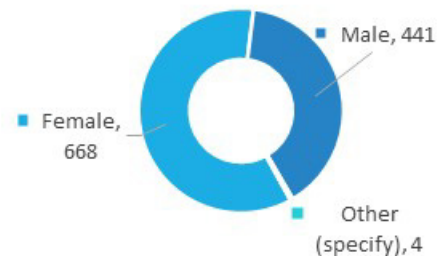
Demographics

Respondents were most likely to be white (83%), non-Hispanic (77%), over 45 years old (82%), and to have earned a bachelor's degree or higher (82%). Over 50% were female and nearly 50% had a household income over $75,000 per year. The greatest number of responses came from West Virginia, Ohio, and Kentucky, with the least number of responses from Mississippi, South Carolina, and Maryland. When asked to choose the role that best represented their interest in the ARC strategic plan, most respondents identified as community members or professionals in the fields of education, community development, or economic development. The fewest number of respondents identified as students, foundation members, or researchers.
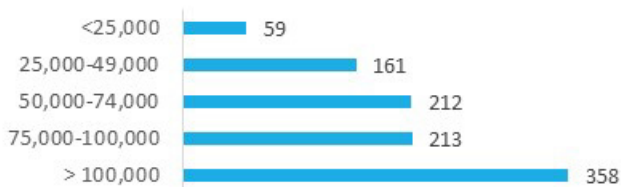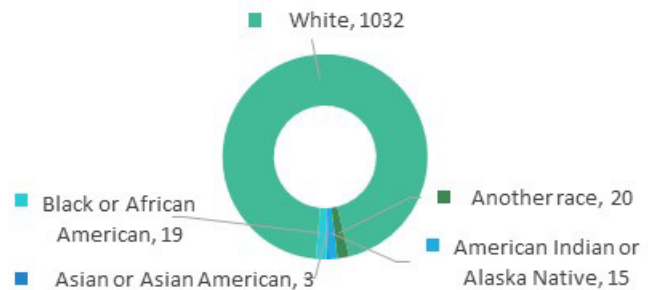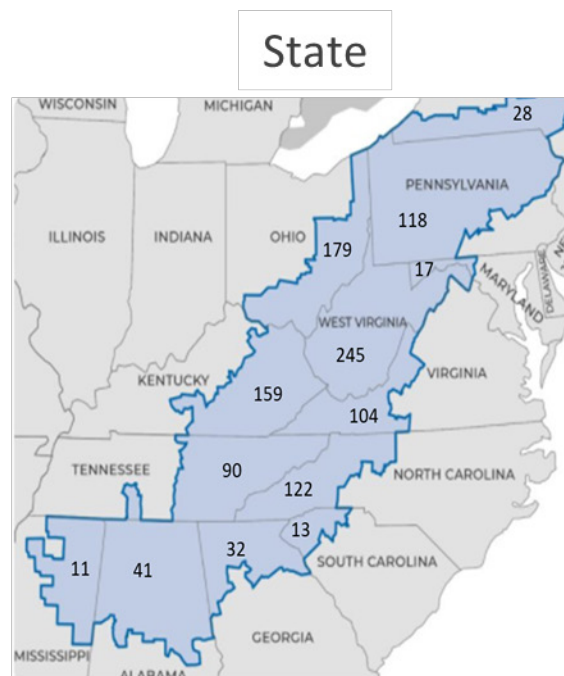
Age

Age group	Count
Younger than 20	1
20-24	12
25-34	86
35-44	173
45-54	227
55-64	325
65 or older	302

Gender

- Male, 441
- Female, 668
- Other (specify), 4

Annual Household Income

Income	Count
<25,000	59
25,000-49,000	161
50,000-74,000	212
75,000-100,000	213
> 100,000	358

Race

- White, 1032
- Black or African American, 19
- Asian or Asian American, 3
- Another race, 20
- American Indian or Alaska Native, 15

Primary Sector or Role

Sector or Role	Count
Other/community member	191
Education	159
Community development	144
Economic development	142
Other community-based organization	134
Private sector business	128
City/county/state employee	74
Health	60
Workforce development	41
Elected official	31
Researcher/academic	28
Foundation	22
Student	4

State

Strategic Plan Elements Ratings

Respondents were asked to rate the importance of a number of strategic plan elements and sub-elements. Of the five main elements, economic opportunities were ranked most important overall, followed by workforce and natural resources. Among the sub-elements, improving access to broadband internet and communications infrastructure stood out above all categories as most important. The top seven important/most important sub-elements, across all elements, were:

1. Improving access to and usage of broadband internet and communications infrastructure
2. Supporting programs that prepare students and adult learners for success in postsecondary education, training, and credential attainment
3. Supporting the natural assets and resources of the Region
4. Supporting the expansion and retention of existing businesses and jobs
5. Support for ongoing professional development, skill-building, and re-skilling of workers
6. Support for local entrepreneurs through training and/or access to capital
7. Improving access to affordable, quality healthcare

Percent Rating Important or Very Important

Workforce
- Supporting programs that prepare students and adult learners for success in postsecondary education, training, and…
- Supporting programs that address substance abuse and workforce participation
- Support for ongoing professional development, skill-building, and re-skilling of workers
- Improving access to career opportunities and removing barriers to sustainable employment
- Improving access to affordable, quality healthcare

Natural and Cultural
- Supporting the tourism, recreation, and hospitality assets of the region
- Supporting the natural assets and resources of the region
- Supporting the arts, culture, and cultural heritage assets of the region
- Improving community character through investments such as downtown revitalization and historic districts

Leadership and Community Capacity
- Strengthen the capacity of local governments and non-profits to work for transformative community change
- Development of future regional leaders
- Development of current regional leaders to foster economic and community improvement

Infrastructure
- Supporting both new construction and building revitalization
- Providing quality and diversified housing options
- Improving water/wastewater infrastructure
- Improving regional highway and transit systems
- Improving access to and usage of broadband internet and communications infrastructure

Economic Opportunities
- Supporting the expansion and retention of existing businesses and jobs
- Support for the attraction of new businesses and jobs
- Support for local entrepreneurs through training and/or access to capital

(x-axis: 50% 60% 70% 80% 90% 100%)

Community Conversations

Nearly 500 Appalachians participated in *Envision Appalachia: Community Conversations for ARC's Strategic Plan*, a series of six virtual public input sessions held in April 2021. Attendees were randomly divided into smaller, facilitated breakout discussion groups during the sessions and asked for their input on Regional strengths, challenges, and solutions.

Focus Groups

In addition to the public sessions, ARC hosted 16 focus groups with experts in the Region to explore targeted topics in greater depth. The following stakeholder groups were invited to participate in focus groups:

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- Health
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Participants were asked about strengths, challenges, and trends related to each topic, as well as what ARC's role should be, what success would look like, and how to ensure equitable responses to all Appalachians in the context of the focus group's topic.

Introduction to Synthesis Process and Key Themes

Maher & Maher combined qualitative data from the open-ended survey responses, Community Conversations breakout sessions, and focus groups. Each comment was grouped by primary theme, and then each theme was further analyzed and organized into sub-themes. The following overarching themes were most prevalent in stakeholder responses.

Crosscutting Takeaways

- Appalachia is a multifaceted, varied Region where place matters. This requires locally tailored solutions to meet the needs of local communities.

- The pandemic both highlighted and exacerbated the depth and breadth of all of the challenges in the region.

- Access to reliable, affordable broadband is a cross-cutting theme as well as an equity issue viewed as essential to improving the lives of Appalachians.

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- There are opportunities and interest in applying an equity lens at all levels (ARC, state, local) of planning.

Each theme and its sub-themes are discussed in further detail in the section that follows.

Theme Area Summaries

Regional Culture and Quality of Life

Appalachians consulted in the stakeholder engagement process described residents of the Region as resilient and their communities as close-knit. They emphasized the Region's many cultural and historical strengths and assets. However, they were concerned by the lack of quality jobs, low wages, and generational poverty. Many stakeholders expressed a need to "tell a new story" to change stereotypical perceptions about the Region and highlight its unique assets.

Population Decline vs. Growth

Some communities are experiencing aging demographics and population decline as young adults leave for jobs or to pursue post-secondary education in urban areas within and outside Appalachia. This "brain drain" of young people and educated workers creates a smaller tax base, negatively impacts schools, and leaves communities with fewer options for work and doing business, making it harder for career-minded people to choose living in a rural town. However, all bright young people do not leave, and some communities are experiencing success with retaining and diversifying intergenerational populations that are invested in the future for their children and grandchildren. Stakeholders often noted that one way to address the myth that young people need to leave their rural communities to have a good life is to tell new stories that diverge from the typical Appalachian stereotypes and focus on what the Region has to offer for families and young professionals.

Other communities are experiencing growth as newcomers from metro areas seek permanent housing in new locations. While in some cases this has increased openness to new ideas, it also causes concerns about communities losing their small-town feel, longtime residents having to compete for housing, and new challenges for local governments. Stakeholders note that communities must work on maintaining their unique culture, Appalachian identity, and local sensibility, while also embracing the skills, ideas, and energy of newcomers.

Quality of Life and Cost of Living

The Appalachian Region is an attractive place to live for many reasons, including its lower cost of living, natural beauty, recreation opportunities, lower crime rates, friendly people, and opportunities to telecommute.

However, there is also devastating poverty, as well as a lack of affordable housing and easily accessible grocery stores and healthcare in parts of the Region. Obtaining a driver's license, insurance, and a reliable car is a barrier for many residents in the Region. Many workers who do have transportation cannot afford to live in the communities where they work and must spend hours commuting; residents may also face long drives for medical appointments and shopping for basic necessities. Long hours and commutes and low wages also make it difficult for working-aged people to find time to get more actively involved in their communities. All of these issues also make it difficult for businesses to recruit employees. Stakeholders noted that addressing quality of life needs for local employment, medical care, childcare, shopping, and transportation would create more vibrant communities and in turn strengthen the workforce and attract and grow businesses. There is also a need to foster more cultural and recreational assets; repurpose old coal mines into tourist attractions; develop high-quality entertainment centers; and highlight local culture, restaurants, cuisines, diversified communities, and unique downtown areas as part of quality-of-life enhancement efforts.

Quality of Jobs

Respondents shared that low wages and a lack of quality jobs in the Appalachian Region are a huge challenge. While the pandemic has certainly highlighted inequality between essential workers and higher-earning telecommuters, the transition from previously dominant industries like coal has been ongoing over the past generation. In some cases, these changes have created ghost towns and fewer opportunities for workers to support themselves. The Appalachian Region has put great stakes in tourism, but these lower-wage service jobs do not replace coal mining-level wages, and positions are often part-time, seasonal, and lack benefits.

Stakeholders also noted that it is difficult for youth to find sustainable careers or even to obtain work experience, as adults are working low-wage jobs typically held by high school and college students in order to provide for their families. Meanwhile, older workers are being displaced and replaced by younger, cheaper labor. Many workers cannot afford proper healthcare or savings, and single parents may especially find themselves working two jobs and thus unable to complete the education or training required for a better career. People feel like they are working themselves to the bone and just scraping by. Nevertheless, stakeholders noted that residents of Appalachia have grit and a strong work ethic. They suggested potential opportunities to establish worker cooperatives or to leverage physical assets and resources in the Region (such as the lumber industry) to expand better-paying job opportunities for workers.

Low Labor Force Participation

Many stakeholders shared that employers are having difficulty recruiting workers, and many feel that generous unemployment benefits, especially during the pandemic, and disability payments are disincentives to work. However, others noted that Appalachian workers are dependable and reliable when motivated by good pay and advancement opportunities; a central challenge may be that workers' existing skills do not necessarily transfer to those needed by companies currently looking for workers. While many older workers are retiring, some people are coming back to the Region to work as entrepreneurs or business owners. Thus, there may be an opportunity to tap this entrepreneurial spirit, innovation, and resilience to drive business growth and increase opportunities for labor force participation. Stakeholders also noted that developing opportunities to engage youth in leadership roles may be a long-term strategy for increasing labor force participation and addressing workforce development needs more broadly.

Generational Poverty

Participants in the stakeholder engagement process noted that the legacy of generational poverty has been heightened during the pandemic, as people who were struggling before the pandemic lost their jobs and tried to access services that were already stretched thin. Children without internet access and with limited support at home were particularly impacted during the pandemic, and stakeholders have seen school drop-out rates increase. Stakeholders cited food insecurity, housing barriers, utility shutoffs, climate change impacts, and unaffordable college or trade school programs as factors that compound generational poverty.

They also noted that substance abuse, child abuse, and domestic violence negatively impact long-term wealth generation. Respondents shared that free community college and other training programs, including professional and entrepreneurship skills development, could help some people escape the cycle of generational poverty.

Cultural and Arts Heritage, Assets, and Traditions

Stakeholders emphasized the Appalachian Region's strong cultural heritage, musical traditions, historical assets, foodways, artisans, and creative communities, which attract visitors. While such tourism is beneficial, there is also concern that Appalachian culture is being taken advantage of by outside investors, so there is a desire to ensure a balance between tourism and preserving the Region's natural beauty, culture, and quality of life. Stakeholders noted that it can also be difficult to measure the impact of cultural institutions compared to the impact of tourist attractions. Stakeholders recommended encouraging local participation in cultural arts; teaching local history in schools; and strengthening connections between local food and water systems and local culture as mechanisms for community revitalization and development. They also encouraged leveraging, cultivating, and promoting local attractions, assets, and small districts to promote Appalachian cultural and arts traditions. Regional approaches to this work were noted, which may require training for elected officials to work together across towns. Finally, stakeholders noted that while Appalachian residents have heritage skills (for example, food growing and preserving, musical or other artisanal skills) and a resilient character, they do not always have the capital required to invest in cultural and arts heritage, traditions, and assets.

Community Character, Cohesion, and Changing the Narrative

Stakeholders noted that key strengths for Appalachia include residents' strong Regional identity, pride in place, and sense of community. Smaller communities allow residents to know each other intimately, build deep connections, and commit to helping each other.

Despite these strengths, many respondents shared their feeling that their story is not being told. Negative stereotypes about the Region pose challenges to attracting people and connecting with diverse audiences outside the Region. The persistence of the negative image and narrative about Appalachia obscures the needs and solutions that have been identified, such as the need for improvement of education systems. Stakeholders felt there is an opportunity to share positive messaging and to develop ambassadors to share the beauty, opportunity, diversity, and unique history of the Region. To change the narrative, stakeholders suggested, Appalachians need to build on their assets from a grassroots perspective, drawing on their resilience and determination to make the Region a place that people want to visit and choose to live. This could include sharing stories of community pride and surviving difficult times – depressions, recessions, natural and economic disasters – that are more relevant now than ever. Newsletters and case studies could be used to share stories about Appalachia's people and places and what the Region means to its residents. Stakeholders suggested that creating this "story of place" from diverse perspectives, supported by Regional champions and resources, could help to enhance communities, change the narrative, and attract businesses and people to the Region.

Entrepreneurship and Small Business Development

During the engagement process, stakeholders raised a number of strengths in several areas of focus under the broader entrepreneurship and small business development umbrella. Key among these is the growth of collaborative, regionally-based approaches to economic planning and development that include diverse areas of focus, such as community well-being, sustainability, and place-based growth strategies. Stakeholders also noted that economic diversification efforts are looking at supporting development in the creative, health, tourism, agriculture and food, energy, and cultural arts and heritage sectors. Communities are exploring creative business financing and business support models, drawing resources from diverse sources and partners, and are bringing a wide range of organizations together to provide business development services

and assistance. Stakeholders cited Appalachia's strong entrepreneurial spirit as a key asset, one that is being supported through training and technical assistance for entrepreneurs, development of incubators and support ecosystems for entrepreneurial businesses, and other strategies. Many communities are bringing partners together to support downtown/Main Street revitalization, often tied to entrepreneurship and small business development priorities. Appalachia's location and transportation assets are central to business development and growth; proximity to interstates, rivers, and key commercial and industry centers are strengths in many parts of the Region. Stakeholders also noted strengths related to the growth of remote work opportunities in the Region, especially during the pandemic, which can attract new businesses and workers and provide opportunities for existing residents who do not have access to cars.

Planning and Economic Development Strategies

Stakeholders raised several key challenges related to planning and economic development strategies. One is a persistent "traditional" economic development focus on attracting large corporations from outside of the Region, often with significant economic incentives that are not tied to wage standards or environmental impact considerations. Many stakeholders emphasized the need for more focus on small business development and support for residents and companies in the Region. There were also concerns related to the amount of external land and asset ownership, which generates significant extraction rather than generating locally owned wealth. Stakeholders noted that it can be difficult to sway elected officials away from their desire to land the "one big company"; focusing on economic diversification and small business development may be more incremental and takes significant political will.

In response to these challenges, stakeholders raised a number of opportunities and potential solutions. These include pursuing collaborative, multi-partner approaches for economic development planning, inclusive of development districts, school districts, governments, unions, and others. Stakeholders emphasized that investing in public and higher education infrastructure and cultural and natural assets is a critical part of economic planning and development. Several stakeholders noted the importance of benchmarking and learning from other communities to find out what works, and of leveraging existing studies and plans to identify best practices rather than "reinventing the wheel." There were recommendations for analyzing returns on past investments, such as determining which past economic development and business attraction investments have generated returns in communities and added resources to them. Stakeholders also noted the need to focus on small business development and retention, particularly in rural areas of the Region. Finally, some stakeholders suggested reexamining regulations, restrictions, and tax structures that may be disincentivizing companies from locating in the Region.

Economic Diversification and Growing Local Industries

Stakeholders identified several challenges to efforts to diversify Appalachian economies and grow local industries. A trend of industry decline (for example, coal and steel) and the closure of many businesses, particularly small businesses during the pandemic, have negatively impacted communities in the Region. A ripple effect of these closures is a decline in tax and other revenues, which leads to vacant properties and deteriorating infrastructure. In the words of one survey respondent, "It is hard to attract new businesses to a community that looks like it's falling apart." Continuing "loyalty" to coal in some parts of the Region also presents a cultural and political challenge to efforts around economic diversification. Communities that are trying to develop and grow local industries and businesses cited the lack of consistent broadband and cell phone service, business' limited online presence, and limited access to local supply chains and national and global markets as challenges to economic diversification and growth. There are also concerns in communities that are transitioning to more tourism-based economic diversification, including rural displacement and cost of living increases.

Participants in stakeholder engagement conversations raised a number of potential solutions to identified challenges. Creating more robust local supply chains for new industries, (such as outdoor gear manufacturing), could be accomplished with significant public/private partnership investment. Workers

formerly employed in extraction industries have skills that are transferable to manufacturing. Stakeholders also suggested potential new economic growth and employment opportunities in the trades, sustainable agriculture, renewable energy, and technology. Expansion in these industries will require investment in areas such as broadband infrastructure, road improvement and highway access, water treatment (coal mine water pools, farm run-off waste, and fracking flow water), and flood mitigation. Communities that have experienced significant population loss and are struggling to maintain their infrastructure with much smaller population bases could benefit from assistance with "right-sizing" themselves for their evolving situations.

Entrepreneurship

Expansion of entrepreneurship in Appalachia faces several challenges. Perhaps chief among these is lack of access to capital, which in some cases is lack of capital itself, and in other cases is a matter of entrepreneurs not knowing how to tap into available capital. Navigating the process for obtaining assistance from the Small Business Administration (SBA) and other funding sources can be very challenging for entrepreneurs, and very small businesses, in particular, may need more hands-on technical assistance and very early-stage "catalytic capital" just to get them to point of being ready to apply to SBA and similar support. Would-be entrepreneurs often lack the business skills and financial literacy necessary to succeed and may also not have access to important business support services. Some stakeholders also noted that the Region may be a difficult environment for investors to navigate.

Stakeholders identified a number of opportunities and potential solutions related to these challenges. Many emphasized an evolving economic development focus that prioritizes entrepreneurship and small business start-up, rather than business attraction, particularly in rural and smaller communities. Significant capacity building and training support is essential to this effort, as is consideration of different incentives (for example, real estate tax abatements and job counts are not drivers for entrepreneurship). Early-stage seed funding like philanthropic dollars, Kentucky's Invest 606 business accelerator funding, and Appalachian Impact Fund dollars which blends capacity-building grantmaking with creative investment capital have worked well. Business incubators provide valuable support to entrepreneurs, as do entrepreneurship networks that bring together a range of business services and supports for groups of entrepreneurs. Expansion of the availability of venture capital, philanthropic funding, and other non-government dollars were recommended. Some stakeholders noted that accessing low-interest loans or grants is particularly difficult for small businesses, many of whom pay workers as contractors (issuing 1099s rather W2s). While these businesses create a lot of jobs, they are excluded from many programs that require proof of job creation via employees rather than contractors. Finally, several stakeholders noted that providing entrepreneurial training and business incubation support for young people may be an effective strategy for stemming out-migration.

Financing and Other Business Support Systems

As noted above, lack of access to capital is a perennial challenge for businesses, particularly small businesses, in Appalachia. Many stakeholders shared difficulties with getting pandemic stimulus funding to rural areas and rural businesses as a barrier. Access to credit for small businesses is also a challenge. From a broader community perspective, declining tax revenues have had significant impacts on small businesses and the organizations that serve them. Smaller communities also face challenges raising match dollars, which limits their ability to obtain federal funding.

In response to these challenges, stakeholders suggested several potential solutions. Coordinating credit allocation policies and strategies across banks, CDFIs, and other entities that are lending in the same region is one potential approach. More flexible federal funding models would also benefit communities; for example, longer grant periods and multi-year funding would support sustainable project implementation and organizational stability. Stakeholders would also like to see more communication and strategic leveraging of funding across federal partners. Some stakeholders suggested exploring alternative sales tax structures to capture online sales. Finally, expansion of funding for business infrastructure and entrepreneurial education is an opportunity area.

Downtown/Main Street

Stakeholders identified a few key challenges to downtown/Main Street revitalization efforts. One is the barriers posed when the majority of downtown property is owned by a single individual or small number of individuals, making it difficult to meet demand for space and offer options for interested businesses and organizations. Another challenge stakeholders noted is that federal funding (from ARC and other agencies) for downtown revitalization is often tied to fair wage laws, which do not always align with the economic realities in rural communities. There is also a need for broadband and other programming investments to ensure the success of Main Street district strategies.

In terms of opportunities and solutions, stakeholders noted that "buy/shop local" campaigns can help build support for Main Street. In some communities, co-operative members, for example members of makerspace co-ops manage and staff downtown retail shops. In some areas, Main Street communities worked with the state authorities to shut down some streets to encourage residents to shop outside. Finally, stakeholders noted that many downtown programs need financial support, and town and county officials may need to be urged to support these programs.

Geography, Location, and Transportation Infrastructure

Stakeholders identified a few critical challenges regarding geography/location and transportation in Appalachia as they relate to business and economic development. While some parts of the Region are located advantageously, in other parts accessibility is limited, and topography is a barrier. In some areas, there are not enough goods coming in and out to manage logistics costs, and economic development partners are exploring distribution centers to address this issue. Stakeholders also noted that without transportation resources, residents cannot exit public assistance and move into living-wage jobs. The lack of transportation is especially acute in small towns where residents might have to drive an hour to get to a grocery store.

One potential solution related to geography/location and transportation infrastructure challenges includes using smaller, more local producers and suppliers. Stakeholders suggested that another might be identifying financial support to leverage former industrial space that is advantageously located.

Remote Work

Stakeholders had some discussion related to remote work in the context of entrepreneurship and small business development. They noted that while the expansion of remote work opportunities in the Region is positive from economic development and job growth perspectives, challenges and barriers remain. Chief among these is limited broadband infrastructure and availability in parts of the Region, which may limit employers' ability to offer remote work opportunities and job seekers' ability to telework. Stakeholders also cited the need to make small, rural communities more attractive to small businesses and remote workers so they can complete with larger, well-known communities with more established cultural heritage, natural resource, and recreational assets.

Opportunities and potential solutions related to remote work that were identified by stakeholders include building broadband infrastructure and capacity and assessing the impacts and success of recent incentive programs to attract remote workers to locate in Appalachia.

Talent/Skill Development

Stakeholders highlighted investment in strategic talent and skill development as critical to the future prosperity of Appalachia. Numerous challenges were identified, including an overall mismatch between available jobs and talent, which in some places presents as too little talent to meet the needs of employers and, in other places, as the opposite scenario, with too few job opportunities for the available workforce. Most noted that a root cause in both cases was the workforce's lack of technical and/or soft skills. In the first scenario, there may be people to fill jobs, but they lack the necessary skills; in the second, the lack of a skilled

workforce deters businesses from locating or investing in the Region, limiting available job opportunities. It is also worth noting that, in a third scenario highlighted by stakeholders, there is literally not sufficient population to fill jobs due to out-migration from the Region caused by the lack of opportunity and infrastructure that contributes to quality of life. Commenters repeatedly noted this vicious circle of poverty attributable to a lack of education, skills, and infrastructure.

Participants also noted that there are clear strengths in the Region around talent development, including community colleges, which were cited as a critical pillar in communities to support education, economic, and community development. Promising strategies and solutions are happening throughout the Region through partnership across industry, education, workforce, and economic development. These partnerships are focused on building critical skills in demand sectors to help workers earn and learn simultaneously or to support their faster reentry into the workforce. More detail regarding these strengths, challenges, and solutions are provided below.

Jobs/Skills/Workers Mismatch

In addition to the various mismatch scenarios noted above, participants also cited severe workforce shortages in specific industries as especially problematic, most notably in healthcare and the skilled trades. In the healthcare industry, workers burned out from the pandemic are leaving a field that was already understaffed. Commenters also noted backlogs in manufacturing and worker shortages in skilled trades, including construction and specialized contractors who are responsible for the completion of one specific job on a project.

In terms of the types of skills in demand, businesses stress they need workers with soft skills (professional conduct, punctuality, communication, etc.) in addition to technical skills. Others noted that the lack of transportation, childcare, and other employment supports contribute to those employers' hiring and retention challenges overall. These issues are described in more detail in the next theme.

Many of the solutions offered for this challenge lie in developing the infrastructure and supports to retain and attract workers and businesses as described under the Employment Supports theme and in other themes of this report. Other solutions focus on working with employers to educate young people on the various high-growth industries and occupations in the Region, the work environment, and the opportunities and benefits that could be available to them after graduation. Commenters also noted the importance of working with companies to better define short-term credentials and skills that a young person could obtain to start on an employment path, rather than having to obtain a four-year degree. This would also allow companies to recruit workers out of high school rather than seek college graduates, who rarely return to the Region after completing their degree.

Education Opportunities that Lead to Employment

The sub-theme cited most frequently in this area was the need for high-quality and readily available educational opportunities to advance residents' careers and to support the workforce needs of the region's employers. Stakeholders raised the following elements under this sub-theme.

In terms of challenges, stakeholders consistently noted a lack of sufficient and high-quality education opportunities across the Region. In some cases, this included early education and K-12, but was most often raised in the context of workforce development for older youth and adults. Participants also noted that the lack of childcare, broadband, and transportation can have the same limiting effect on people's ability to access education opportunities as it does on their ability to take or retain employment. Broadband, in particular, is as essential for virtual education opportunities as it is for entrepreneurs seeking e-commerce opportunities.

In addition, several challenges regarding funding were shared both at the college and individual level. For small community colleges, it is difficult to support everything that employers may want. Career and technical

education programs, while ideal for meeting employers' shorter-term training needs, are expensive, and typically cannot serve many students simultaneously. This can be especially challenging with declining enrollment on the academic side of the college, which helps to fund the non-academic programming. Individual students are also often deterred by the cost of training, which will likely lead to long-term student loan debt.

Stakeholders also raised a number of strengths related to the role of education in talent development. The importance of community and four-year colleges as economic engines for the Region was raised repeatedly; communities lacking these educational institutions often lag in workforce and economic development. In addition to providing access to degree and short-term training programs, colleges attract businesses – many companies tour college facilities during site selection. Community colleges, in particular, can be flexible and agile to design programs to meet employers' needs. They have already established partnerships in many regions to strategically upskill workers based on those needs. In fact, many of the potential solutions outlined below involve key roles for community colleges to play in forging partnerships with industry, workforce, and economic development.

In terms of potential solutions and opportunities, stakeholders noted several promising models currently in place across the Region that could be replicated or scaled to address the identified challenges. The model most consistently raised was a focus on bringing together education, workforce, economic development systems, and industry representatives to ensure that training is designed to meet industry needs and leads to employment. These partnerships also provide a forum for employers to learn about and consider hiring and upskilling options other than traditional degrees. Several examples around industry and public partnerships were raised and cited as positive models for replication.

Many other strategies were raised that are typically thought of as components to career pathway systems that can be established in partnership with industry to define "paths" for individuals to enter and advance in careers. They include things like short-term training that leads to credentials, dual high school/college enrollment, credit for prior learning, stackable credentials, work-based learning (on-the-job training, apprenticeship, internships, etc.), and career awareness education for younger youth to learn about high-growth industries and occupations. Career pathway systems can also incorporate a focus on soft skill development, both in curriculum and work-based learning experiences.

A primary solution raised for funding challenges was simply "investment." Several commenters noted that investing in improving the quality of K-12 education in the Region will drive community and economic development overall. Stakeholders identified "community schools," which incorporate other types of professionals, such as social workers, into school systems as strong models for addressing the need for family supports to engage in both education and, ultimately, employment. Models offering free community college were also raised as a solution to the student loan issue, as was providing funding to colleges to support program start-up costs for both equipment and faculty, the latter of which can be very difficult to lure away from the private sector.

Diverse Workforce and Equitable Workforce Opportunities

A final focus area includes key input around the importance of investments in training to ensure a diverse and equitable workforce. Colleges shared a concern that individuals with the most barriers are often overrepresented in training programs, (e.g., early childhood education) that lead to lower wages and less advancement opportunity than other offerings. Others noted the importance of having a diverse workforce in professions such as healthcare, education, and social work, where those receiving services want practitioners that mirror their community.

Potential steps to address these challenges include better defining what is meant by "diversity and equity" and establishing goals and conducting planning to identify steps to move the needle. Targeted outreach to

key populations could improve the diversity of enrollment in education opportunities, and the provision of wrap-around supports would also help students with barriers stay in training programs through completion. Attendees of the Historically Black Colleges and Universities (HBCUs) focus group also noted that their institutions are underutilized, and that the Region as a whole would benefit from more proactive engagement and collaboration with HBCUs to drive more equitable outcomes.

Employment Supports

Stakeholders provided significant input regarding the need for establishing a foundation of key elements, including childcare, housing, transportation, broadband, and substance abuse recovery assistance, to support Appalachians' ability to enter and remain in the workforce. Although all elements were noted as essential to increasing labor force participation and growing the economy and prosperity in the Region, childcare and housing rose to the top as the challenges raised most often and identified as particularly acute. The focus on childcare may be attributable to the pandemic, which drove many parents, usually mothers, out of the workforce due to lack of care for their children. Related to housing, stakeholders noted that the current focus on tourism can drive up the cost of living. Additionally, the prevalence of low-wage jobs in the Region was repeatedly noted as a barrier to affordable housing. Commenters also noted that these issues, along with others that challenge the quality of life in Appalachia, drive a vicious circle of out-migration, further hampering efforts to grow the economy and thus improve the quality of life.

Strengths were limited in this theme, with challenges far more prevalent in discussions. The primary solution offered for these elements was simply "investment," although those providing input did share potential ideas to address some issues that could be replicated or scaled for greater impact. Additional detail and nuance regarding each sub-theme are provided below.

Childcare

Stakeholders noted that women in Appalachia already had lower workforce participation rates than men prior to the pandemic, and this issue was exacerbated by the closing of schools and daycare centers over the last year. This issue was noted repeatedly in the survey, Community Conversations, and various focus groups. Most noted an overall lack of childcare - either because it is just not available at all, or it is too expensive, low quality, or not offered during second or third shifts.

The use of childcare as a tool for employers to attract and retain employees was raised as a potential solution and was noted as an existing strength in some communities. Others noted the need for an overall investment in funding for childcare to make it more readily available, higher quality, and more affordable. Commenters also cited the need to train more childcare workers to increase both the availability and quality of childcare.

Housing

The lack of affordable housing was presented as a much more complex issue than childcare throughout the survey, Community Conversations, and focus groups, with variance based on location. For example, housing affordability was viewed as a challenge in many regions and an advantage in others, where participants noted that the lower cost of living often allows people in the region to get better housing than they would in more developed areas. Others expressed concern that the lack of investment in many regions has left much of the available housing outdated and, in some cases, dilapidated, and noted that building new housing is a challenge due to the high cost of lumber and construction components. It was noted that in many areas, the only available housing is either high-end or very low-end, and this lack of middle-class housing impedes the ability to attract both companies and a middle-skilled workforce to support overall economic development.

Many noted that recent social trends have also impacted the availability and affordability of housing. The pandemic drove many people who can work remotely to seek more rural locales, which also drove up housing prices in those locations where stock was already limited. In addition, stakeholders noted that the focus on

tourism as an economic development strategy has certainly brought jobs and investment, but it has also raised the cost of housing and living overall. Additionally, wages in that industry are typically not high enough to allow workers to live in the areas in which they work. Finally, stakeholders shared that in tourist "hot spots," wealthier people are buying housing as second homes or turning second homes into short-term rentals listed on Airbnb and VRBO, which further reduces the housing stock.

The primary solution offered for this complex problem was simply investment in the development of quality, affordable housing. Stakeholders noted that, in some cases, housing assistance funding is available, but those eligible often have nowhere to spend those resources. They emphasized that programming and investment must drive the development and repair of housing on a scale that will attract companies and support a strong workforce.

Transportation to Support Employment

Although issues and challenges regarding transportation are discussed in greater detail under the infrastructure theme, it is important to note that lack of transportation options was also repeatedly raised as a barrier to people successfully entering and remaining in the workforce. Lack of transportation is also a barrier to accessing education opportunities. Commenters noted that, as a whole, the Region is very car-dependent and the cost of cars is out of reach for many people. However, without reliable and safe transportation, people cannot get to work.

Healthy Workforce

Just as workers need to be able to get to and from work while knowing that their children are secure, commenters noted that a strong workforce is a healthy workforce, and, in many places in the Region, physical and mental health challenges, as well as substance abuse, are limiting the ability for many individuals to work. Some participants stated that while the unemployment rate in their area may appear low, a significant number of people are not looking for work due to substance abuse or mental health issues.

In addition to an increase in funding for mental health and recovery services, some other tangible solutions were offered for this sub-theme. Additional training and peer-support specialists for those in recovery, workforce reintegration programs, and supported employment for people in recovery would help more people to recover and reenter the workforce. Stakeholders also suggested that working with and supporting companies that are willing to hire workers out of prison and in recovery would help address the challenge. Commenters also mentioned the benefit of Employer Resource Networks (ERNs), a model that asks companies to pay a reasonable fee to have a success coach on-site to provide direct coaching and connections to supports for employees that need help addressing barriers.

Infrastructure

Stakeholders identified aging and inadequate infrastructure as one of the most significant barriers to community prosperity. This challenge has a negative impact on overall economic development, workforce development, community and individual prosperity, business and talent attraction and retention, and access to healthcare and education, among others. Stakeholders mentioned difficult geography, traditionally underfunded infrastructure systems, declining population (which has led to tax base and revenue challenges), lack of funding support, and challenges related to coal-dependent or mono-economy communities as overall challenges to updating and maintaining Appalachian infrastructure. In addition, stakeholders indicated that the competitive nature of grant applications often disadvantages those communities that may need it most, because they do not have the matching funding, management capacity, or experience to carry out the requirements of the grant. Finally, stakeholders shared that the complexity of the challenges around infrastructure can be discouraging for communities. Several factors were cited that decrease communities' confidence that they can successfully address infrastructure needs, however essential that work may be to

quality of life. These factors include underfunding of overall site preparation and development, compounding costs of neglected infrastructure, population decline, and lack of sustainable funding streams.

The infrastructure improvement needs and priorities most often mentioned by stakeholders include investments in general infrastructure and economic development readiness planning; energy (including electric, heat, oil and gas, and alternative energy sources); water, wastewater, and septic; digital infrastructure, including broadband and telecommunications; transportation infrastructure, including roads, highways, and public transit; waste management; and other intermodal transportation often key to commerce, such as rail, ports, waterways, and airports. Many stakeholders cited infrastructure investments as having one of the largest returns on investment for economic and community prosperity in Appalachia.

General Infrastructure Planning, Development Readiness, and Impact

Stakeholders often mentioned the importance of infrastructure in preparing and marketing development-ready sites for industrial and economic development in communities - development that brings with it jobs and a chance at personal and community prosperity. While some regions mentioned ready industrial development sites as a strength, others shared that development-ready sites and industrial parks sat empty and unused, or still failed to attract significant industry investment and job growth. In addition to the many infrastructure challenges described below, participants discussed the negative impact on their communities of neglected brownfield and industrial sites, failing public and private buildings, and vacant or underutilized redevelopment-ready sites that could be used for other purposes. Potential solutions included creative and adaptive reuse suggestions for unused buildings to promote space for arts and cultural venues, community spaces, makerspaces and entrepreneurial incubators, and other tenants that would contribute to community cohesion, economic growth, and overall quality of life. Stakeholders placed particular emphasis on redevelopment and development-ready infrastructure for coal-impacted communities and those significantly impacted by economic downturns and systemic, generational poverty.

Energy (Electric, Heat, Oil and Gas, and Alternative Energy)

Utility conversations largely focused on physical and geographic barriers to providing quality, accessible, and affordable utilities, and on a shift from coal-based energy solutions to alternative and clean energy sources. Comments favoring both an adherence to traditional energy production in the Region and a transition to sustainable energy solutions were offered. Affordability and quality were discussed most often, largely in the context of barriers previously mentioned and the lack of competition among utility providers, which has led to high costs. Alternative energy and sustainable solutions that respond to climate change are further covered in the "Leveraging and Protecting Natural Assets" section of this synthesis summary report.

Water, Wastewater, and Septic

Aging and failing water, sewer, and septic infrastructure was discussed largely in the context of the affordability of and access to clean drinking water. Such access is a key element of personal and community health, and, obviously, economic opportunity. Continued deterioration of these systems has significantly impacted quality of life, livability, business and talent attraction, population levels, and other determinants of healthy and prosperous communities. Already failing systems are exacerbated by funding challenges caused by declining tax bases and revenue, and by the purchase of land and other assets by outside parties that leave land undeveloped and inaccessible. Additionally, communities often must come back three and four times for additional financial assistance and support from ARC and other funders to address water and wastewater needs. Large-scale asset analyses are needed to understand the depth and breadth of what is necessary for long-term, sustainable solutions that involve state government, municipalities, and others, instead of short-term, piecemeal solutions.

Stakeholders noted that geographic barriers also play a role in water and wastewater infrastructure underdevelopment. These barriers prevent the opportunity for regional solutions to municipal utility cost-sharing, as many Appalachian communities are not always contiguous or reachable due to topography.

Respondents recognized that cost barriers are experienced by customers/residents, utility providers, and municipal governments themselves. In response, many communities are consolidating and collaborating to find funding solutions to address this challenge.

Knowledgeable stakeholders, specifically the water/sewer focus group, recognized the opportunities to creatively integrate funding and advocate for long-term funding solutions. Such solutions include strides by ARC to leverage other funding sources to ensure solutions are robust enough to address the full extent of this problem. In addition, they suggested that funding application processes could be streamlined and requirements relaxed. Respondents also noted that ARC can also assist with this issue by convening stakeholders, providing project profiles examples, and pushing for long-term funding and solutions.

Digital Infrastructure – Broadband and Telecommunications

In the wake of the COVID-19 pandemic and the attendant increased need for remote work, school, and telehealth, broadband access, quality, and affordability were discussed by stakeholders perhaps more than any other need across Appalachia. Urgency for broadband funding support was discussed in terms of personal health and prosperity, long-term economic parity through education and training attainment, economic development, entrepreneurship and small business development (especially for e-commerce and other web- and data-dependent industries), business operations, talent attraction and retention. Telecommunications access, quality, and affordability were also mentioned, particularly regarding cell phone coverage. Overwhelmingly, stakeholders indicated that the theme of broadband coverage and its impact on a community's ability to thrive cannot be understated.

Stakeholders identified a range of significant challenges to providing reliable and consistent broadband. These include geographic barriers to installation of broadband infrastructure; lack of overall competition among internet service providers (ISPs), which causes affordability issues for consumers; an uneven playing field between private and public ISPs, where competition does exist, or inability for public providers to form or play a role; misunderstanding of the depth and breadth of broadband needs and technologies required; availability of technology to access broadband; an immense and sustained funding need (detailed in a later section of this report), funding inflexibilities, and grant management concerns; and misclassification of funding streams that confuses digital infrastructure needs with physical infrastructure needs.

Stakeholders frequently mentioned needs for continued planning and mapping, better public data on deployment of middle- and last-mile services (FCC data being inaccurate and untrusted), and progress tracking on the ground with respect to communities of all sizes. They noted that while most rural communities have significant barriers and lack of access, urban areas in the Region experience their own barriers to access and affordability. For example, it was mentioned that while urban areas often have better access to and options for broadband service, there are still neighborhoods where service is not reliable or consistent. Additionally, affordability is still a barrier for many customers, as significant wealth gaps in urban areas leave many unable to afford service even when it is available. Funding and support for capacity building, technical assistance, and training at the local level is important to overall success, and stakeholders stressed that those activities should be considered crucial to expanding the deployment of broadband service.

Stakeholders mentioned a few promising models, including forming regional co-ops and providing interim solutions to getting broadband access to communities—both before and during the pandemic—like sending buses with Wi-Fi access to communities and establishing public Wi-Fi hubs.

Transportation – Roads, Highways, and Public and Personal Transit

Roads, highways, and public and personal transit were discussed frequently by stakeholders as important to business development, community development, getting people to work, and accessing healthcare and food. While there were not a lot of innovative solutions or strengths discussed about transportation, challenges

discussed illuminated the importance of increased funding and continued support for transportation infrastructure improvements.

Participants stressed the importance of access to quality roads and transportation to overall quality of life and participation in the economy. The quality, access, and capacity of roads and highways was discussed. It was noted that road and highway systems' integrity and improvements are a key asset to community prosperity. More often, stakeholders discussed challenges, including crumbling roads and local revenue and budget constraints that impact the ability to develop and maintain them, the need for significant and sustained transportation investment to enhance economic opportunity in communities, and investing in 21st century systems like outer belts and smart highways so that Appalachia does not fall behind other areas of the nation.

Access to roads is key to individual and community prosperity; many communities mentioned that they feel left out of economic activity when they do not have reliable and convenient access to highway systems. Ongoing Appalachian Development Highway System (ADHS) development was mentioned as a key priority. Issues of staffing capacity and expertise to obtain funding and manage projects, and difficult geography were mentioned as challenges to building more roads and highways systems, and in improving those that already exist. Stakeholders also discussed the need for exploration of creative and more efficient land use for roads and other forms of public transit, recognizing both the limits of difficult geography and balancing the value of development with preservation of natural assets.

Public transit was similarly discussed as a critical need for individuals to get to work or school and access dwindling healthcare facilities and grocery stores, and for solving challenges related to the distance between affordable housing and these critical resources. Several stakeholders mentioned concerns that Appalachia would be left behind other areas of the country that have the funding and local and regional resources to innovate and build 21st-century public transit systems. In addition, stakeholders discussed trends that may emerge in response to the global pandemic, including new transit needs that accommodate social distancing and health concerns. Equity was discussed in the context of accessible public and personal transit options, including access for the most socioeconomically disadvantaged communities, individuals with disabilities, and others. As one respondent succinctly summarized, "If you don't have access, you don't exist."

Other Intermodal Transportation

Few stakeholders specifically mentioned transportation outside of roads and highways or public transportation. Those that did discussed the advantages of being near a major port, or having adequate railway systems for connectivity and transportation, distribution, and logistics (TDL) purposes to advance industry attraction and job creation. Others mentioned underutilized or aging intermodal assets, particularly coal industry "relic" railways that are no longer being used. A few stakeholders mentioned the importance of funding and ARC support for addressing rail, waterway, and TDL infrastructure needs.

Waste Management

Stakeholders seldom mentioned waste management, but a few shared concerns that trash disposal and garbage clutter impact economic development opportunities. Others identified the need for regional leadership for waste management oversight and concerns about the impact of waste on the Appalachian environment.

Natural Assets

Appalachia's myriad natural assets – mountains, rivers, lakes, forests, parks, waterfalls, and trails – and plentiful outdoor recreation activities were repeatedly mentioned by stakeholders as key strengths for the Region. The Region's natural assets serve as a primary driver of its tourism economy, and they also drive growth and employment opportunities in connected industries, like manufacturing and retail sales of equipment for outdoor recreation (e.g., bicycles, kayaks, camping gear, etc.). The Region's natural beauty and outdoor

recreation opportunities may also attract a wider array of industries and companies that want to offer "quality of life" amenities to their employees, thus contributing to economic diversification.

Stakeholders also identified Appalachia's climate and growing "green" energy footprint as important Regional strengths. Weather in many parts of the Region is quite favorable year-round, and climate change impacts in the Region might be less than in other parts of the country, potentially making the Region an attractive "refuge." Many states in the Region are focused on shifting away from extractive energy production and towards the production of renewable energy from sources like solar, wind, and hydroelectric. The increased focus on sustainable energy production is contributing to the launch of new companies and workforce development efforts in the Region. In some cases, the sites of former extractive energy production sites, such as mines, are being transformed into wildlife preserves or walking trails, creating new opportunities for tourism and recreation.

Sustainable Economic Diversification and Growth

While Appalachia's natural assets are undoubtably an enormous strength for the Region, stakeholders identified several challenges related to their use and their protection. Despite the growing focus on renewable energy, there remains in parts of the Region an emphasis on extractive energy industries like coal and natural gas, which threaten the health of the natural landscape. There is some political resistance to economic diversification in other industries like recreation and tourism. This is, in part, strengthened by the fact that extractive energy jobs traditionally have higher wage levels and less seasonal employment fluctuations than jobs in the tourism, retail, and hospitality sectors. And while economic diversification and growth are generally seen as positive for the Region, stakeholders emphasized the importance of ensuring responsible and sustainable growth strategies that protect and preserve Appalachia's natural assets and advance opportunity and quality of life for the Region's residents.

Stakeholders pointed to a number of opportunities and solutions related to ensuring sustainable economic growth, while also protecting the Region's natural beauty and resources. One key strategy is a focus on supporting community-driven economic development by ensuring that the Region's residents are driving the vision for sustainable growth and identifying growth strategies that benefit residents and visitors alike. There is an interest not just in attracting visitors to the area to enjoy the natural environment, but also ensuring that they spend money in the communities they visit that will benefit residents. This will likely require ongoing and increased investment in supporting entrepreneurs in communities to launch and grow place-based businesses in the tourism, outdoor recreation, and cultural and historical heritage sectors, as well as supporting sectors.

Environment/Climate, Green Economy, Energy, and Renewable Energy

One challenge stakeholders noted related to the growing focus on solar and wind power generation was a concern about the loss of agricultural land and indigenous lands. They also raised concern that Appalachia may lag on alternative energy strategies, such as installing charging stations for the growing number of electric vehicles. Stakeholders also noted climate change as a significant concern from a number of perspectives, including impacts on Appalachia's natural resources, economic impacts, and the potential for significant migration to the Region from coastal areas over the next 20-40 years.

Stakeholders provided input on a range of opportunities and solutions related to climate, renewable energy, and growing the green economy. At a fundamental level, there is a need to increase awareness of climate science at both the local and regional levels. Stakeholders cited a need for planning for climate adaptability and climate resiliency, with a racial equity focus included in the planning framework. There may be opportunities to use Office of Surface Mining pilot funds to finance more creative approaches, such as landscape-based climate solutions, and to harness carbon sequestration models to generate funding to build and support trails long-term. Stakeholders urged creativity around renewable energy, but at a scale that makes sense for the Region; that is, it may not be desirable or beneficial to grow the renewable energy sector

to the level that extractive energy production sector once had in the Region. In terms of green economic development, stakeholders offered a range of ideas, including promoting green recreational experiences; expanding sustainable agriculture and farmers markets; and developing creative education and destination spots on sites of old coal mines, akin to the Eden Project in the UK. They also noted the need for workforce development investments and strategies to position residents to take advantage of new opportunities in a greener economy, such as re-skilling former coal workers for positions in the solar and wind energy sectors.

Natural Resources and Recreation and Tourism

As noted above, Appalachia's natural resources are an enormous strength and are key drivers of recreation and tourism in the Region. At the same time, however, stakeholders raised concerns related to protecting the Region's natural assets from overuse and misuse. In many parts of the Region, the pandemic increased the level of visitors from outside the Region looking for safe recreational opportunities, and many areas struggled with trail saturation, litter, and abuse of outside spaces. Stakeholders also noted that during the pandemic, more people from outside the Region bought second homes to use for telecommuting or short-term rentals. While there are certainly economic upsides to this investment from outside the Region, there are also concerns about decreasing quality of life, increasing cost of living, and reduced access to natural resources and outdoor recreation opportunities for residents of Appalachia. Stakeholders want to ensure that growth of recreation and tourism in the Region does not contribute to gentrification, displacement, and loss of culture for residents. Participants in stakeholder engagement activities also shared that accessing funding to develop or expand outdoor recreation and tourism opportunities and locations in the Region can be a challenge. In a related vein, while national forests/federal lands are a great recreation and tourism asset, they do not pay local taxes, so that is a loss of public revenue for local governments.

With these challenges in mind, stakeholders offered a range of ideas around opportunities and solutions related to natural resource-based recreation and tourism. Perhaps chief among these was the need for marketing and "getting the word out" about Appalachia's natural resources and plentiful recreation and tourism opportunities. Some communities have created marketing materials that highlight particular natural assets (e.g., a waterfall trail brochure that captures 12 majestic places to take pictures) and ambassador programs, in which Regional volunteers communicate the story of the Region and talk about its natural beauty. Some stakeholders suggested that there may be an opportunity to brand Appalachia, as a whole, as an "ecotopia" to boost tourism. Stakeholders emphasized that outreach and marketing around recreation and tourism opportunities can also be an important way to combat negative stereotypes about Appalachia and to communicate the Region's opportunities rather than just challenges.

Stakeholders also emphasized the importance of promoting natural assets and tourism opportunities more collaboratively and at a larger scale, rather than individual towns "going it alone." State and regional tourism departments or bureaus are very helpful in this regard. Where those do not exist, county-based or multi-county collaboratives can serve as clearinghouses for tourism opportunities and can communicate the aggregate tourism resources that exist (lodging, restaurants, outdoor activities, other amenities) on a larger geographical scale. This is the model pursued by the Kentucky Wildlands, for example. This collaborative approach can help areas within the broader Appalachian Region market more cohesive tourism itineraries and experiences that link natural resources, recreation, cultural and historical assets, foodways, and shopping opportunities and other assets.

Sustainability and Protecting the Environment

During the stakeholder engagement process, there was a significant amount of feedback on the need to balance the expansion of tourism and recreation in the Region with protecting Appalachia's environment and natural resources. Stakeholders cited a range of challenges, from visitors leaving litter and trash outdoors, to the environmental impacts of increasing industrialization, highway development, sprawl, and growth of Amazon warehouses and "big box" retailers. Continued extractive energy production and logging and

Christmas tree farming in parts of the Region were noted as ongoing environmental threats. Stakeholders also mentioned the growth of invasive species as hazards to native plants, animals, and landscapes.

Stakeholders emphasized the importance of focusing not only on Appalachian infrastructure development, but also on environmental remediation and restoration, implementation of sustainable forestry practices, and regenerative agriculture. They see opportunities to enhance funding and other supports for environmental stewardship and preservation; some amount of revenues generated through tourism and recreation-connected economic development should be dedicated to support lands maintenance and management and environmental protection. Some stakeholders suggested partnering with organizations like Leave No Trace, the Appalachian Trail Conservancy, and other conservation corps to engage youth and others in environmental protection and restoration and offer education and training in natural resource management, wildlife protection, and environmental conservation. Others suggested that K-12 education systems in Appalachia could play an important role on teaching students about environmental and natural resource stewardship.

Leadership, Capacity Building, Planning Support, and Funding Opportunities

Stakeholders consistently highlighted the importance of capacity building and planning support, leadership development and empowerment, and funding opportunities as equally important to success in leveraging ARC resources as any programmatic offering that ARC provides its communities. Stakeholders continually described Appalachian residents as resilient, collaborative, and creative in addressing regional challenges. Most stakeholder conversations included discussion of how ARC can build upon and amplify these strengths by providing Appalachian communities with funding support, expertise, and technical assistance to foster leadership and build capacity.

Participants stressed that key aspects of ARC's mission include developing the government, non-profit, and philanthropic ecosystems to support community efforts, and assisting in grant readiness, application processes, engagement of subject matter expertise, and implementation of grant goals. Local leadership needs to be included, empowered, and trained to develop and drive strategy. Stakeholders emphasized that regionalism and community-driven identification and prioritization of challenges, as well as design and implementation of solutions, are key to success in reaching economic parity in the Region. The sub-themes below include stakeholder feedback and solutions regarding all of the support ARC provides, or could provide, to current and potential grantees to carry out these crucial activities, as well as feedback on funding processes and ways to measure success.

Leadership, Organizational Partnerships, Collaborative Solutions, and Resilience

While many stakeholders recognized the value of learning from other rural communities and subject matter experts from across the country, there was a strong preference for local, empowered leadership to tackle challenges using the expertise that exists within the Region. Many noted that local leadership is especially critical to effectively prioritizing challenges and implementing the solutions most impactful to local prosperity. Several stakeholders expressed distrust of external leaders' motivations when looking to assess the needs of Appalachian communities and develop solutions. Stakeholders discussed several challenges to empowerment of local leadership and developing solutions, including shrinking local government budgets and tax revenue; vibrant leaders without the resources and capacity to be successful (or even apply for funding to help solve challenges); lack of transparency; and lack of foresight and commitment to long-term, systematic change.

Solutions to the challenges were discussed in the context of empowering and financially supporting community-driven leadership, engagement, and development of grassroots solutions. Participants recognized the importance of engaged citizens that come together to solve regional challenges collaboratively, engage new generations of leaders, and leverage the experience of long-time community

leaders in planning processes. Stakeholders also emphasized ensuring that locally-driven solutions are designed by teams of diverse community members (including youth, HBCUs, and leaders from small rural and large metropolitan communities). However, they also noted that community cohesion is inconsistent across the Region, and the desire to make progress was sometimes described as a battle with resistance to change and a desire to "maintain community values." Other key themes mentioned by stakeholders included:

- A need for strong regional and local ecosystems consisting of government, non-profit, business, and philanthropic partners to support the work;

- Collaborative and sustainable solutions that involve business leaders and community-based and other organizations in securing funding and effectively implementing strategies to support movement from "distressed" to "attainment status"; and

- Support for collaborative models like the Appalachian Service Project to improve communities in ways that impact several of ARC's strategic priorities.

Capacity Building, Strategic Planning, Technical Assistance, and Research

The above strengths, challenges, and opportunities regarding leadership and community-driven solutions are very reliant, according to stakeholders, on communities' ability to tap into capacity building, technical assistance, expertise, and research provided by ARC and affiliated federal, state, and local partners. Investment in regional collaboration, best practice sharing, capacity building, the Local Development District network, and inclusive local strategic planning sessions helps to overcome gaps in local government and economic development understanding of challenges and capacity to develop responsive solutions. Stakeholders noted that insufficient planning and capacity building funding puts projects at risk.

Participants also discussed the need for regional catalogues of resources, practices, and assets to avoid duplication, leverage expertise, braid resources, and make research/data-driven decisions. They indicated an interest in ARC more fully supporting these needs to achieve success in funded projects. Furthermore, stakeholders would like ARC to distribute funds more equitably to communities that may not currently have the capacity or expertise to submit ARC grant applications or implement ARC-supported programming.

Many stakeholders expressed appreciation for leadership training supported or run by ARC and encouraged the Commission to continue efforts to expand ethnic, racial, regional, and socioeconomic diversity specifically in the Appalachian Leadership Institute. Many others emphasized the importance of leadership training and peer sharing/leadership networks as important to driving local strategy forward. Stakeholders expressed particular interest in increased support for leadership training delivered by local leaders and experts who have ties to their communities and can facilitate the generation of local and regional solutions.

Funding Opportunities

Participants discussed the importance of ARC's funding mechanisms to achieving success across strategic priorities. They mentioned that the Partnerships for Opportunity and Workforce and Economic Revitalization (POWER) and Investments Supporting Partnerships in Recovery Ecosystem (INSPIRE) initiatives provided an opportunity to secure more funding to support Appalachia. Local communities, however, lack sufficient capacity to respond to and manage the influx of funding opportunities through ARC and other federal agencies. Stakeholders noted that philanthropic funding partners and non-profit assistance have helped increase leadership and community capacity to respond to these opportunities; address unexpected problems, especially in this last year; and support any associated barriers to the success of ARC and other funding investments.

While stakeholders described ARC as more flexible than most federal agencies and funding partners, they also recognized the need for a strong non-profit and philanthropic ecosystem to fill gaps and provide more flexibility in funding. Integrated funding approaches and deployment of funds were noted as crucial, as was

community-controlled grant-making to support federally funded projects. In the focus groups in particular, participants identified priorities for funding and the greatest return on investment in communities. These include:

- Investments in expanded and improved broadband;

- Infrastructure (including water/sewer);

- Opioid misuse treatment and rehabilitation;

- Physical and mental health;

- Capacity building and local planning;

- Homelessness and housing affordability;

- Public transportation and roads/highway systems; and

- Workforce investment.

Overwhelmingly, stakeholders emphasized the importance of investments in people, in addition to investments in businesses and economic development, again stressing the need for increased support for local/regional capacity building and planning activities, which they felt have been underfunded in the past.

Much of the conversation and comments focused on ARC grant application/grant eligibility, processes, management, and performance and reporting requirements, with many stakeholders describing them as dense, burdensome, and exclusionary (especially to small municipalities that may need them the most). The match requirements were perhaps mentioned most often, indicating that they were difficult to meet, as were timelines for performance, as many strategies for economic mobility require years to see meaningful impact.

Stakeholders gave a few suggestions for ways that ARC can ease these burdens for grant applicants and grantees. They include:

- Providing additional capacity building funding and grant-seeking and management training opportunities;

- Providing a sliding scale for matching funds based on community size and revenue/budget;

- Providing more flexibility in funding availability and focus to respond to unforeseen challenges (e.g., the pandemic);

- Reducing application requirements and process burden; and

- Re-joining the previously funded/supported Appalachian Funders Network to lead new solutions for fund development and playing a key role in the attraction of large foundation, venture capital, and private business support to better leverage and extend the impact of ARC funding and programming.

Health

Participants in the stakeholder engagement process shared a number of strengths and opportunities related to health and healthcare in Appalachia. Specifically, during the COVID-19 pandemic, telehealth has been helpful throughout the Region to expand individuals' access to healthcare services. Telehealth allows for flexibility and can help residents who are sometimes isolated feel connected and get the care they might otherwise have difficulty accessing. Stakeholders also noted that while there is vaccine hesitancy in areas throughout the Region, there is also good public health infrastructure, including public/private partnerships, to support roll-out of the vaccine.

Stakeholders shared numerous best practices throughout the Region related to substance abuse treatment and recovery and mental health ecosystems. ARC's Substance Abuse Advisory Council, established in response to the opioid epidemic, provided the Region with a good foundation to build upon. Stakeholders noted that integrated and comprehensive care has been proven to be effective for substance abuse treatment; in Kentucky, Addiction Recovery Care and its peer support model has been effective in substance abuse treatment and recovery efforts. Stakeholders also mentioned models in which communities are funding psychologists to work in school systems to focus on mental health treatment for students. Participants recognized that challenges like the opioid epidemic require comprehensive, community-wide responses. Increasingly, programs are working more collaboratively to address community-wide issues, such as utilizing coalition models for addressing needs and leveraging strong public/private partnerships throughout the Region. Stakeholders noted that COVID-19 brought opportunities for partnership building throughout the health and healthcare communities.

Finally, stakeholders also shared some interesting work being done at the intersection of food and health. Some communities are experiencing success in using national grant dollars that were recently made available to address food insecurity. Stakeholders also noted that food banks have played important roles in food access and distribution and reducing food insecurity during the pandemic.

Health and Healthcare

Access to healthcare, including emergency and urgent care centers, is the biggest challenge identified by stakeholders under this theme. Rural hospitals and healthcare facilities have closed or consolidated in recent years. Broadband is not readily available everywhere, limiting the ability of facilities and patients to utilize telehealth. Stakeholders noted that access is also limited by the cost and the limited availability of healthcare specialists, as it is difficult to recruit and retain physicians in the Region. While these issues were present prior to the COVID-19 pandemic, the pandemic exacerbated them. Stakeholders did share some promising models related to enhancing access, including mobile medicine programs and partnerships with universities to make investments in rural communities to address access to specialty medicine.

Stakeholders emphasized that unhealthy people have difficulty finding and keeping a job and, therefore, there is a direct connection between the health of the Region and employability and economic and workforce development. High rates of obesity, heart disease, and type 2 diabetes have a negative impact on the Region's ability to attract employers. Oral health disparities persist, especially for adults in Appalachia, and stakeholders noted that oral health and economic empowerment are inextricably linked. Additionally, black lung disease (the result of inhaling coal dust) is still impacting Appalachians in a significant way. As stakeholders stressed, positive health outcomes are essential for growing viable communities and, currently, health outcomes are poor, especially in rural communities.

Stakeholders also suggested that the population dynamics of Appalachia should be considered in developing strategies for the overall health of residents and their ability to access healthcare services. Appalachia's aging population will naturally need more healthcare supports. In addition, while there is a significant veteran population in the Region, Veterans Administration (VA) services are limited.

Lastly, many stakeholders mentioned the distrust of science among many Appalachian residents and resistance to COVID-19 vaccines. They raised concerns about the impacts on tourism in the Region if Appalachia is viewed as unsafe regarding the virus.

A critical point that stakeholders raised is that health and healthcare (including oral and vision health) are both significant factors in economic development, and in fact, some suggested both should be viewed as infrastructure in the Region. Comprehensive health planning is needed throughout Appalachia to truly understand the needs of the communities and the variances in needs by sub-region and community. Stakeholders recommended that such planning should be done through an inclusive engagement process that ensures the needs of all residents are reflected in resulting strategies and implementation. Conversations

about health, stakeholders emphasized, must be tailored to the cultures and receptiveness of the communities involved, as health is not spoken about uniformly in the Region. Often residents of the Region may not understand the necessity in addressing certain health concerns because those illnesses are viewed as common throughout Appalachia. Engaging, however, with more diverse community members on the topic of health can begin to build a community health focus. Finally, stakeholders also suggested that an emphasis on wellness is critical in Appalachia.

Substance Abuse and the Mental Health Ecosystem

Substance abuse throughout Appalachia was noted by the stakeholders as a major challenge. They noted that substance abuse is rampant, and treatment is often limited in availability and not holistic in scope. Most commenters connected substance abuse treatment and mental health treatment and referred to needing an ecosystem for the two. It was also frequently noted that COVID-19 exacerbated and escalated both the substance abuse epidemic and the often co-occurring mental health crisis. There are simply not enough resources for individuals needing addiction treatment. Of all the challenges known in Appalachia, some stakeholders classified the opioid epidemic as the worst. No one has been untouched by it and the available resources are simply not sufficient.

Stakeholders observed that, in a cyclical manner, declining economic conditions foster an environment for mental health issues and other "diseases of despair." This, in turn, has significant impacts on the Region's ability to recruit and retain employers and increase job opportunities. Children are born to persons with addiction, which requires the need for specialty health services that are often not available in their communities. Commenters noted that the opioid epidemic strains every system within a community, including health, legal, and social services. Grandparents are raising grandchildren because parents are unable to do so. As one example of these impacts, Appalachian Telemental Health shared that it has experienced a 600% increase in requests for services since the start of the COVID-19 pandemic.

Stakeholders emphasized that the foundation should be laid for a substance abuse and mental health treatment ecosystem that incorporates multiple resources of the community. Some of these resources include the legal system, workforce development, health and wellness, mental health, housing, and transportation. The Addiction Recovery Care model was noted as one to be replicated; access to such treatment should be maximized. Stakeholders envisioned that this ecosystem would offer "no wrong door" access to treatment and other assistance at any level. They also noted that the ecosystem should be built to recognize the changing nature of substance abuse and that polysubstance use is more the norm than the exception. Participants noted that the limited availability of programs is not the only access barrier; the cost of programs is another. Often, those individuals with health insurance have large treatment co-pays and insurance deductibles, which makes it challenging to obtain or even pursue.

Further, stakeholders noted that systems are needed to provide comprehensive and holistic substance abuse services at all stages at which they might be needed – not just treatment, but also prevention and intervention. Similar to the suggested treatment ecosystem model, prevention and intervention strategies should include the full array of necessary partners and services. Stakeholders noted that developing these comprehensive and well-networked substance abuse ecosystems will require education and training strategies and programs to build a qualified workforce for these jobs.

Participants in stakeholder engagement activities stressed the need for developing widespread community support for those recovering from substance abuse and also plans for addressing the impacts of substance abuse on communities. This may include financial support for family members raising children of individuals who are in treatment. Ongoing community education about substance abuse and healthy alternatives was also cited as a part of this support model; the Iceland Project Model was mentioned as an example. Stakeholders also noted that community-based coalitions are critical to education, prevention, intervention, and treatment efforts in the Region. Substance abuse recovery systems require the engagement of

collaborative partners who can help identify and address needs across the substance abuse continuum and its impact on communities.

Food Access

Stakeholders raised access to nutritious and healthy food and clean water as vital components of the larger health and healthcare theme. They noted that parts of Appalachia meet the definition of a food desert, meaning limited access to affordable and nutritious food. Grocery store chains have closed and nothing new has opened in their place, limiting easily accessible food options for people. Further, eating healthfully generally costs more than unhealthy food options, a challenge for lower-income residents and communities. As with other challenges, food access and affordability barriers were exacerbated by the pandemic.

Stakeholders identified several potential opportunity areas related to food access. These include increased focus on local and regional food systems. They also suggested redesign of those systems to make healthy foods more affordable and more readily available to residents of the Region. App Harvest was mentioned by stakeholders as a best practice in this industry. With the rural nature of much of Appalachia and the rich history of farming, there could be new opportunities to address food shortages. Stakeholders suggested that local participation ought to be encouraged and outside investment considered.

Equity

Stakeholders across all engagement activities were asked to provide their input on challenges, strengths, and solutions for advancing economic and social equity across the Region. Overall, stakeholders struggled to identify existing strengths within the area of equity, and recognized the need to drive equity throughout healthcare, education, and legal systems, as well as land ownership within Appalachia. In fact, the need for equity throughout structures, systems, and organizations was highlighted as a thread that is woven throughout the Region's critical issues: opioid epidemic, access to healthcare and education, and generational poverty, to name a few.

Many stakeholders expressed urgency and shared ideas for how to build capacity in local communities for increasing diversity, equity, and inclusion, starting with more detailed and nuanced data collection. Further, stakeholders noted the urgent need for organizations to seek and create opportunities for all community voices to be heard and to be intentional about equity work. Key sub-themes within the equity theme include insufficient and inequitable systems; intentional and inclusive engagement; and programs and funding. Each is explored in further detail below.

Insufficient Data and Inequitable Systems

"The rising ocean does not bring all ships with it if some are tied by anchors to the bottom." This quote was shared by a survey respondent. It makes the point that while regional and community-based work often results in positive outcomes for many, some groups cannot benefit because of their already marginalized status.

Stakeholders noted that data is a key challenge to advancing equity in the Region. Specifically, there is a lack of diverse representation in data used to make decisions regarding the funding, programs, and services that can address inequities. For example, data should be gathered and tracked to define the inequities that exist between various demographic groups regarding social determinants of health within the Region. That information could inform the identification and prioritization of strategies and solutions to address disparities across populations.

Data regarding economic disparities across demographic groups is also lacking and hindering the ability of communities to identify strategies to address inequities. Respondents noted that while the Region may generally be behind the rest of the country regarding economic indicators, Black residents Region are more

adversely affected than white residents. Current data used to guide education and banking decisions, as well as a variety of program funding decisions, does not provide adequate insight into the economic conditions of all demographic groups and, therefore, limits communities' ability to design and deliver solutions to address disparities across racial and other demographic lines.

Home appraisal values and the link to home ownership was also cited as a challenge. Homes in the Region do not always appraise for what they cost to build. Additionally, in-migration to the Region is driving up prices in the housing market, limiting access to home ownership for residents Region and also inflating prices in the rental market. As home ownership is a critical step in building wealth for individuals and communities, decreased access to it contributes to rising inequity.

Additionally, stakeholders noted that the COVID-19 pandemic exacerbated these existing inequities by forcing individuals, primarily women and others already earning less, to leave the workforce to take care of children or other family members. Caregiving responsibilities and inadequate care supports are preventing individuals from returning to work. Stakeholders highlighted internet and technology access barriers as another significant challenge to equity. Stakeholders observed that the pandemic also affected access to healthcare, where hospital systems and other providers located in areas without access to reliable internet were not able to offer residents telehealth services.

Stakeholders emphasized that there is significant opportunity to determine the root causes of systemic inequity and make concerted efforts to change those systems. As one example, they noted that while ARC programs help economically distressed communities, including marginalized populations, those programs are not designed to target inequity within communities. This may be an area for ARC to focus on in the future.

Intentional and Inclusive Engagement

Stakeholders noted an overall lack of diversity in the general population of Appalachia, which creates a void for diverse representation in all aspects of community development and prosperity work. With limited diversity, stakeholders observed, children are raised in homogeneous communities and those communities remain insular, which impacts children's worldview and their ability to learn about different groups and populations. Furthermore, for those Appalachians who are a part of minority or marginalized populations, their ability to find their sense of place and community is also limited. This lack of "place" or community belonging, coupled with the rural nature of the Region, can exacerbate isolation for already-marginalized groups. Individuals who identify as Black, Indigenous, and other people of color (BIPOC), for example, may want to live and work in Appalachia, but may face difficulties finding their sense of community in the Region. Representation matters and this issue could have a negative impact on individuals desiring to move into the Region as well as keeping BIPOC Appalachians within the area. Stakeholders also noted that elected officials frequently maintain insular perspectives, which stifles connectivity and interaction with the world outside of Appalachia and creates a disincentive for individuals to relocate to the Region.

The key solution that stakeholders noted repeatedly is intentionality. Stakeholders expressed that all groups working in and on behalf of Appalachia must be intentional about creating inclusive spaces and seeking out voices different than their own. Those spaces must be open to all people representing all communities. Stakeholders suggested that it may be necessary to more fully explore and understand the term "diversity" and to identify the various ways Appalachians are diverse; the definition of diversity should be broadened, if needed, to truly be inclusive across communities. For example, consideration should be given to underserved populations that may not be ethnically or racially distinct throughout the Region, such as the lesbian, gay, bisexual, transgender, and queer (LGBTQ) community. Stakeholders emphasized that "minority status" is not straightforward or monolithic, but rather layered and intricate, and this understanding must be at the forefront of efforts to expand inclusion.

In terms of additional recommendations, stakeholders noted that education about systemic inequities throughout the Region may be the critical first step in creating a sense of urgency around the need for

intentional inclusivity. This education would require engaging all voices, particularly those most impacted, in identifying the various systemic issues contributing to inequity in the Region. Stakeholders stressed that developing solutions must be driven by diverse voices in the Region.

Stakeholders consistently emphasized the importance of an inclusive "table" for discussion and decision-making around efforts to enhance equity. They noted frequently that the right people, particularly BIPOC individuals and other marginalized groups, are not always included when decisions are being made. Furthermore, stakeholders often mentioned that the perspectives and expertise of the multiple HBCUs within the Region should be more intentionally included and utilized.

Programs and Funding

Stakeholders noted that there are not enough programs and funding to address the deep equity-related issues within Appalachia. Often, programs are designed to reduce barriers or provide access to a necessary service for a particular population group, to the exclusion of other groups who may also be experiencing service needs and access issues. Stakeholders emphasized the need to ensure that programming and funding in the Region provide equitable access to all manner of community supports and systems needed by all populations and residents to not just survive but thrive.

Stakeholders also observed that programs currently siloed could be integrated as part of a broader ecosystem of supports to achieve a greater return on investment. For example, community mental health providers offer a valuable service within the community and stakeholders acknowledged a need to incorporate those providers in more conversations. They also noted that for substance abuse treatment, a community-wide perspective with multiple partners and providers works best to support individuals in recovery.

Stakeholders also noted that more educational opportunities are needed for young people in the Region to help address disparities in educational equity. They suggested that these could be in the form of additional educational supports throughout the summer months and community-based educational opportunities year-round.

From a funding perspective, participants noted the need to approach grant-making in a more equitable way. To do this effectively, funding organizations need to think more inclusively to create more equitable funding opportunities. This could involve intentional work with BIPOC-led organizations at the point of procurement, for example, to obtain their input and thought leadership. Additionally, stakeholders noted that while sophisticated non-profits may be well positioned to request and receive funding, they are not always in the best position to truly understand community needs or do equity-advancing work in communities.

Stakeholders stressed that organizations that provide funding to the Region should not only seek to fund projects that serve underrepresented populations, but also to engage individuals from those communities to provide input and recommendations on community needs and the manner and methods for issuing funding. They emphasized the value and importance of having diverse and participatory engagement in community leadership, grant writing requirements, grant approval processes, and data collection to truly shape funding opportunities rather than merely issuing funding to underrepresented communities to serve greater numbers.

Lastly, stakeholders noted that any single program or funding source is not the solution for Appalachia. The Region's challenges are long-standing and systemic and will require comprehensive, holistic, and integrated solutions.

ARC Role, Processes, Requirements, and Metrics

Overwhelmingly, stakeholder participants expressed gratitude for and satisfaction with ARC's support of their communities. Areas of support cited include ARC's strong programming, knowledgeable staff, role in representing Appalachia, consistency as an advocate and partner across administrations, and crucial technical

assistance and funding opportunities to support community prosperity and economic growth. Discussion focused largely on specific programming and overall support of communities; technical assistance, project development, capacity building efforts, and research support; outreach, community engagement, and representative voice in prioritization of challenges and solutions design; processes and requirements associated with ARC programs and funding opportunities; ARC staffing and subject matter expertise; and metrics and measures of success.

Programming and Overall Support

Community input participants relayed a variety of perspectives on the strengths ARC brings to the table through its programming, some concerns about priorities, and suggestions for potential improvements and re-prioritization. In general, several comments were made throughout stakeholder engagement about the strength of the INSPIRE and POWER programs and the potential to use them as models to address other focus areas across Appalachia. For instance, participants recommended programming to support continued and important work to address critical infrastructure needs, many of which impact the overall prosperity and economic success of the Region, as well as a focus on tourism as a key industry for creating economic opportunity. In addition, several stakeholders mentioned the importance of leadership training—including the Appalachian Leadership Institute—in preparing communities for success, which is more fully discussed in the "Leadership, Community Capacity, and Funding" section.

Participants across the various stakeholder engagement sessions noted that ARC has been and should remain an integral partner in creating and sustaining employment and education opportunities throughout the Region. Encouraging local collaboration among industry, education, and workforce partners was repeatedly cited as a key strategy and should be an important component of ARC-funded workforce projects. Multiple commenters also asked that ARC prioritize environmental sustainability in planning and funding, including high-quality jobs that support a clean environment.

ARC's focus on, investment in, and support of workforce development was repeatedly raised as a strength for the Region. Many noted the flexibility of ARC funding in comparison to other federal agencies; they also appreciated ARC taking the initiative to really get to know, understand, and build a relationship with the community college system, which has been a game changer for workforce development. Colleges have been able to use or leverage ARC funding to support the development of key programs and training infrastructure needed to upskill Appalachians in in-demand industries and occupations.

There were several recommendations to expand programming priorities beyond economic and workforce development. While these areas were recognized as important, stakeholders requested that ARC programming also include issues of personal and individual prosperity, such as substance abuse, mental health, social injustice, and racism. In addition, comments were made in support of an increased focus on the realities of demographic shifts, changing economic realities, and climate change, accompanied by better education of current and prospective grantees and partners around these issues.

Overall, stakeholders appreciate the role ARC plays in assisting communities in ways that other entities cannot. They encourage ARC to stay open to new ideas, methods, and approaches elevated by their communities, and to continue diversifying strategies to address the needs of all communities across the Appalachian Region.

Some suggestions were provided for ARC's role and priorities going forward, including a focus on opportunities for ARC to partner with other organizations to create better opportunities for Appalachia through larger grants and a wider variety of grants. Others noted that a focus on people-building and place-making may have more payoff than investments in a specific industry. As one survey respondent noted, "Right now the population is either dying off or moving away, and that probably isn't changing until there is adequate infrastructure to allow folks to live and thrive vs. just getting by or living in poverty."

From a health standpoint, stakeholders suggested that ARC's role is to evaluate and reimagine its funding methodologies to align with substance abuse ecosystem models such as the Substance Abuse and Mental Health Services Administration (SAMHSA), the Health Resources & Services Administration (HRSA), and other federal agencies. For example, respondents suggested that ARC can help with articulating a message that there is a role for business to play in building the recovery ecosystem. ARC can help communities build their capacity to address the systemic issues related to health, mental health, and substance abuse. ARC can also advocate to its federal partners on behalf of the Region. Stakeholders also suggested that ARC could benefit from understanding some existing federal structures, like the Community Mental Health Clinic model, which has continuous block grants to support providers, and how states are using those dollars.

Stakeholders shared they appreciate the role that ARC has played in funding infrastructure development (e.g., highways/transportation) that supports tourism and outdoor recreation as well as funding business development in the tourism and recreation sector. However, they also felt that ARC should diversify its funding support in the Region to acknowledge the roles that tourism and environmental protection play in economic development. There are concerns that ARC's focus on expanding road infrastructure in Appalachia has increased dependency upon cars, which many in the Region cannot afford, and has fostered growth of employers such as Amazon warehouses and Walmart locations, with attendant growth in low-wage, unskilled jobs that do not offer sustainable career pathways for residents. Many stakeholders would like ARC to focus more investment on evaluation, development, and enhancement of natural resource assets, such as trails and greenways to promote recreation and tourism in the Region, as well as alternative transportation options. Stakeholders cited the ARC Area Development Program as one that should focus more on investment in natural resources. Workforce training related to tourism and support for downtown revitalization were also noted as needs. Stakeholders also shared that ARC should invest more strongly in environmental remediation, restoration, and protection. Participants were also interested in funding to support environmental sustainability and stewardship and tourism management.

Additionally, many stakeholders are interested in ARC playing stronger and more vocal roles around climate change and climate resiliency in its new plan. These roles might include prioritizing strategies to respond to and mitigate climate change impacts and providing infrastructure funding to help Appalachian communities prepare for climate change impacts. Stakeholders also shared their hope that ARC will support efforts around expanding renewable energy production.

Branding and marketing of Appalachia is another area in which stakeholders felt ARC should play an important coordinating role. Many felt that individual communities are each doing the work of "telling their story" and promoting their natural and other assets, when ARC could play a role in developing and promoting a more cohesive tourism strategy for the Region and marketing the Region on a national scale.

Finally, many stakeholders emphasized the importance of ARC supporting natural resource protection, expansion of recreation and tourism, green energy development, and overall economic development and diversification efforts with a strong equity lens. They urged that disadvantaged and underrepresented populations, including people of color, indigenous communities, individuals with disabilities, women, homeless seniors, and others have a seat at the decision-making table as ARC crafts its new plan and strategies. Further, stakeholders felt strongly that the new plan and strategies must prioritize the protection, advancement, and benefit of the most at-risk individuals and communities.

Technical Assistance, Project Development, Capacity Building, and Research

Stakeholders discussed challenges experienced in accessing accurate data and research to understand the complex challenges experienced across Appalachia. They also raised significant needs for community capacity building and technical assistance to understand ARC programs and grant application processes; manage grant funds and reporting requirements; and educate local leaders about promising practices for addressing community-wide economic challenges and barriers to personal and Region-wide prosperity. One major

challenge discussed was ARC's focus on project-based funding rather than providing significant support for capacity building. Some philanthropic funders asserted that they often have to provide funding to communities just to support them in applying for ARC funding.

There was an overwhelming request for increased funding for crucial technical assistance, project development, research, capacity building, and partnership alignment support from ARC. Participants provided significant input on the need for investment in project development, research, and improved data for informed decision-making. They also stressed the need for ARC to provide support and assistance with applications and processes adjusted to fit the needs of each community, especially according to size and local capacity to manage grants.

Discussions included suggestions for creating technical assistance resources that highlight best practices collected from across the "Appalachian hive mind." One existing resource, an ARC Substance Abuse Advisory Council (SAAC) playbook of promising approaches to support rehabilitation and getting people back to work, was elevated as a best practice that could be replicated for other key ARC priorities. While most stakeholders recommended that tactics, solutions, and funding prioritization should be led from within Appalachia, a few mentioned the value of learning from practices across rural America and capturing all of these promising practices in a format that can inform communities about the most effective ways to meet their challenges with replicable solutions.

Grantees value staffing support and direct communication with ARC subject matter experts and program staff to tackle challenges. Stakeholders discussed ARC's crucial role as a convener and capacity-builder to support asset management studies, mapping of broadband service deployment, and project planning, as well as support in advocating for more funding for infrastructure needs. Additionally, some saw ARC as having a potential role in addressing broadband and water infrastructure affordability for consumers.

Many stakeholders also shared thoughts about how ARC might expand its capacity building and technical assistance efforts, including youth entrepreneurship and entrepreneurship education programs; sustainability planning (beyond chasing individual grants); funding management capacity development; capacity building for entrepreneurial ecosystem builders; and technical assistance to help small businesses access available funding. Stakeholders emphasized that any funding for entrepreneurship and small business development should be accompanied by a proportionate investment in technical assistance and capacity building funding.

Outreach, Community Engagement, and Representative Voice

Those participants less connected to ARC programming, grants, and resources and some of the smallest and most economically distressed communities do not know how to access information about the funding opportunities that ARC provides. In addition, many mentioned that it is primarily government leaders and organizations tied directly to traditional economic development that are most likely to be aware of ARC's role and support. For others, more clarity is needed about what ARC does; how to access and apply for grant opportunities; and what constitutes the Appalachian Region. Still, others more aware of ARC's role and services mentioned that ARC's marketing efforts are stronger now than ever. The challenge seems to be awareness in smaller communities, underrepresented populations, and some community organizations.

Stakeholders shared many comments about making sure that all voices are represented at discussions on solutions to the Region's key challenges, with a key focus on elevating diverse community voices at a grassroots level. Among these critical voices are young people, economically and racially diverse leaders, and communities small and large and rural and urban.

To solve some of these challenges, participants suggested that ARC:

- Continue serving as a strong voice and advocate for the Region;

- Expand outreach to involve more local leaders in decision-making, project selection, and solution generation;

- Diversify the grant applicant pool, leaders engaged in solutions, and size and economic breadth of communities engaged with ARC;

- Provide ongoing opportunities and funding for local networking, capacity building, best practice sharing, and policy-making technical assistance; and

- Meet with, support, and elevate local leaders to drive change through grassroots movements, locally-driven solutions, support to the LDD network, and regular community input and involvement.

In addition, various stakeholders specifically acknowledged the need for ARC relationship development with the HBCUs located throughout the Region.

Processes and Requirements

Process and requirements discussions about ARC offerings largely focused on challenges around the complexity of federal funding applications and requirements. This complexity often leads to reluctance to engage, especially for smaller communities without the capacity to understand, apply for, and manage complex grants. Stakeholders mentioned both perceptions and realities of application complexity and a tendency to hire consultants to help them navigate these challenges. However, many recognized that ARC funding and support often feel less burdensome than that from other agencies and placed a premium on ARC and local non-profit support for navigating requirements. Others recognized the flexibility allowed in responding to the substance abuse crisis and redevelopment of coal-impacted communities through INSPIRE and POWER programming and expressed the wish to see ARC apply the same flexibilities to other programs.

In addition, flexibility in grant application time periods, match requirements, and support for grant accessibility and capacity building were mentioned often as potential ways to increase interaction with ARC funding and services. Participants mentioned a need for consistent communication about ARC priorities and eligibility requirements and clarification around state roles in funding approvals, prioritization, and distribution. Specifically, several mentioned bottlenecks and application denials and reprioritization at the state level and requested there be more opportunities for communities and organizations to apply directly instead of through their states. In addition, and particularly in the current pandemic economy, stakeholders mentioned that it is difficult to include economic goals and data in grant applications during uncertain economic times. Also, the requirement of basic agency involvement in grant administration proved difficult for many, and there were a few frustrations mentioned regarding broadband being considered infrastructure construction, which often limits funding opportunities. Respondents were also interested in more complete and direct feedback from ARC regarding proposals not funded for the sake of improving future applications, as well as continued technical assistance from the agency around accessing, applying for, partnering with others to secure, and successfully managing ARC grants.

From an infrastructure perspective, stakeholders made frequent requests for more flexibility in what is funded, equity in disbursement of funds based on community size and need, and the ability for leaders and partner networks to establish funding priorities locally. Some mentioned the LDDs and states as valuable partners in supporting infrastructure needs, but others suggested removing that structure to allowing local areas to work directly with ARC. Others mentioned the critical role ARC plays in training infrastructure leaders in technical issues, grant writing and management, and other areas key to the success of each infrastructure discipline and to the success of ARC-supported projects.

Stakeholders provided a number of comments related to ARC funding and matching requirements for entrepreneurship and small business development support. Some suggested a temporary moratorium on matching requirements for particularly hard-hit communities. Others noted that ARC funding and funding timelines need to be more flexible to accommodate businesses' development needs and timeframes. Some

stakeholders shared that ARC grants should be made available directly to sustainable local businesses, not just to non-profits. They noted that the U.S Department of Agriculture does this, and it works well. Stakeholders encouraged ARC to continue and expand business support for small, local companies, in addition to the focus on large companies. Others shared their feeling that ARC's grant award process is dated and does not allow for the most innovative or impactful ideas to be selected. They suggested that ARC take best practices from entrepreneurship and apply them to the agency's grant application and award process. Specifically, stakeholders shared that in entrepreneurship, people have moved away from filling out business plans because they are inflexible, long documents that are burdensome to complete. Business models are now the most commonly used tool; these one-page documents are easy to fill out and encourage the use of testing and pivoting if something is not working. They also celebrate and reward customer discovery. Stakeholders also urged ARC to consider new funding models for entrepreneurship and business development support, such as innovative lending and loan-to-grant conversions that were available through stimulus funding during the pandemic, SBA capital challenge programs, revolving loan fund programs, and formation and launch of venture funds.

Stakeholders also noted that communities often compete against one another for funding and encouraged ARC to fund broader regional projects and interstate projects that can link small initiatives together. They also encouraged ARC to play more of a role in identifying and disseminating best practices in entrepreneurship and small business development support from regions across Appalachia.

From an equity perspective, stakeholders suggested that ARC conduct an internal review of its systems, methods, and processes to improve its own levels of equity, diversity, and inclusion. Input is needed from BIPOC leaders about how to shape ARC's work and investments. Included in this internal review should be an analysis of the data sets maintained by ARC and how those data sets are utilized to guide program and funding decisions throughout the Region. Additionally, the analysis should identify where gaps exist within the data relative to minority populations. More research is needed on minority populations and communities within the Region, as well as with minority-owned small businesses and lending and investment opportunities in minority markets.

In alignment with the internal review mentioned previously, stakeholders recommended that ARC evaluate how it awards funding to ensure it reaches the places that need it most, including economically challenged communities, communities of color (where there is correlation with economic classification) and other underrepresented communities. Participants noted that it is a challenge to show an economic impact on communities that are declining, which often is where people of color are concentrated. As a result, ARC's methodologies for determining types of programs and funding as well as decision-making criteria for awarding funds may be skewed away from communities with the greatest need.

ARC Staff and Appointees

Importantly, stakeholders commended the attentiveness, expertise, and availability of ARC staff to support state, local, and regional efforts, especially where ARC expertise supported important issues throughout the pandemic, such as broadband access. ARC's role as an advocate and support to the Region was mentioned repeatedly with appreciation, especially regarding technical assistance with ARC processes and where and how to access grant funding support.

Comments About the Strategic Planning and Input Processes

Many stakeholders commented on the strategic planning process, especially through the survey. Areas of satisfaction included the opportunity to have their voices heard, the inclusiveness and accessibility of the virtual methods for community input, and general nods of thanks toward a strategic planning process designed to refine ARC's mission and strategies to reflect regional needs.

As ARC continues its strategic planning process, stakeholders expressed desires for the ARC strategic plan to include racial equity initiatives such as recruitment for leadership programs, funding for minority businesses, and support for African American historic sites. Stakeholders were clear that ARC should not simply look at funding diverse, inclusive programs, but rather should focus on capacity building in this area throughout the Region. Stakeholders also suggested that ARC consider dedicating a percentage of its budget to racial equity work.

Metrics, Measures of Success, and Evaluation

Stakeholders shared challenges with respect to metrics and measuring and evaluating success, largely focused on the need for improved data to set baselines and project goals, as well as frequent assertions that documenting real impact, improved metrics, and return on investment (ROI) takes time—often much longer than grant periods allow. This is especially true for long-term challenges like generational poverty, racial and socioeconomic inequity, and historical and structural economic barriers. In addition, several stakeholders, including philanthropic partners, mentioned the need for increased risk tolerance with funding and relaxation of performance measures to allow for projects that may fail but are worth it because the risk/cost of NOT addressing the challenges they seek to solve is too great.

In addition, stakeholders stressed that a more traditional focus on job creation metrics leaves out important foundational economic readiness and prosperity indicators like improved transportation and infrastructure systems, a healthy and ready workforce to fill jobs created, and associated measures of healthy communities. Other stakeholder discussions focused on the importance of first understanding the elements that lead to community distress and then aligning performance metrics to improve each of those challenges, as opposed to focusing on a top-down approach to business growth and job creation. Additionally, those professing a crucial need for increased capacity building funding and support also suggested improved measurement of its impact to justify continued investment in such activities.

The most substantive discussions about metrics and measures of success occurred in the context of overall economic development success and the leading measures that help communities attain gains in long-term lagging measures. For example, recognizing that many prosperity measures take years to achieve, discussions focused on measuring shorter-term goals, such as improving access to affordable childcare that will, in turn, result in longer-term achievements such as increased labor force participation. Overwhelmingly, the traditional economic development focus on job creation numbers was challenged in favor of new metrics, especially in smaller communities without large job creators. Many of these are discussed below. "Failure" was defined in one discussion as "people working harder, but no one seeing an increase in wealth and quality of life."

Each stakeholder focus group discussed, albeit often briefly, metrics and measures of success. Below are some key takeaways from stakeholder input on topic-specific metrics.

- **Economic and Workforce Development Metrics:** A substantive conversation occurred in the economic development focus group. One key theme in these discussions was a focus on measuring impact to communities, not just overall "value," median versus average wages, and job creation numbers (especially traditional understanding of jobs as opposed to full-time equivalent staffing models). Specific metrics/measures of success discussed included: increasing income rates (and thus decreasing poverty rates); decreasing unemployment rates; aligning education and credential attainment with skill needs; economic diversification; tax base increases; increasing the number of households with access to broadband and increasing internet speeds; decreasing food insecurity; retention of in-demand and educated talent; steadying population dynamics; enhancing business attraction (number of new companies) and growth; reducing the percentage of vacant commercial spaces; attracting private investment; increased pool of early-stage capital for new businesses/start-ups; increasing the number of companies offering family sustaining jobs/wages; adding

entrepreneurship training/education programs and job incubators; and enhancing the number of veteran-, women-, and minority-owned businesses. There was also discussion focused on good, quality jobs and the differences between "real" jobs and "gig" jobs.

Additionally, for many stakeholders, ultimate success in talent and skill development means a better quality of life in the Region with less out-migration, a higher value placed on education by families and communities, and a higher-skilled workforce that attracts new business development. Many also identified interim measures that could show progress, including new and stronger partnerships with industry and education; higher education attainment levels overall; and increased credential attainment in growth industries that lead to higher wages.

- **Infrastructure Metrics:** Discussions focused largely on developing formulas for communities so that measures are more proportional to their current state, gaps, and progress goals; research support to set baselines for performance; setting goals that are achievable in both the short- and long-term; and prioritizing affordability to consumers as a primary measure of success.

- **Broadband Metrics:** Stakeholder discussion stressed the importance of measuring not only accessibility and availability across Appalachia, but also in measuring middle- and last-mile service, improving the accuracy of baseline data regarding deployment (not relying on private ISP data), and measuring success based (perhaps most importantly) on affordability to customers.

- **Transportation Metrics:** Achievable success in the transportation space was discussed in context of expanding focus beyond blacktop and surface transportation networks; focusing Appalachian Development Highway System (ADHS) efforts on last-mile delivery system checkpoints rather than the larger highway network; and prioritizing 5-10 projects per state to achieve maximum and transformative impact.

- **Natural and Cultural Assets Metrics:** Discussion focused largely on leveraging natural and cultural assets for tourism success but also included measuring impact and responsibility for being good stewards of the land.

- **Health Metrics:** Stakeholders emphasized that success looks like inclusive communities with partners focused on improving the social determinants of health. This includes a focus on measuring and improving health outcomes through sustaining individuals socially, economically, and spiritually. Stakeholders also noted that economically healthier communities also tend to be physically healthier. They reflected on the importance of quality of life as a contributor to physical and economic health. Potential measures suggested include rates of obesity, diabetes, and other diseases; overdoses and substance abuse rates; how quickly people can access and receive substance abuse treatment; reemployment rates; and others. One suggestion was for ARC to select one to two indicators for a concentrated, long-term focus, rather than attempting to focus on multiple indicators concurrently. Additionally, in discussions of the health disparities between Appalachia and the rest of the country, stakeholders recommended that ARC focus on addressing equity challenges across various populations and communities within the Region.

- **Equity Metrics:** Stakeholders noted that tracking success in this cross-cutting focus area should focus on measuring the number of communities and collaborative partners working on the impact of equity efforts on social determinants of health; economic parity through a diversity, equity, and inclusion lens; inclusion of BIPOC individuals and communities in leadership roles; priority identification and solutions development; and other indicators.