

## MEMO

**To:** Verné Boerner, Chair - Program and Planning Committee, Chair  
**Through:** Mike Abbott, Chief Executive Officer  
**From:** Steve Williams, Chief Operating Officer  
**Date:** July 16, 2021  
**Re:** FY20 Closed Grant Report for Trustees

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This memo serves as a preface to assist the reader in understanding the grant information included in this report.

### **FY20 Closed Grant Report**

The report was generated to provide additional information about Trust funded projects as the Trust finalizes its amended FY23 budget. The report is organized into sections related to Trust focus and priority areas, but also includes a section examining on non-focus area grants. Each grant included in the report contains information about the grant's purpose, outcome results, and an individual staff analysis with a FY23 budget recommendation. For each grant the following are included:

1. A high-level project summary with general information about the grant.
2. A detailed project analysis completed by Trust program staff.
3. The project description from the grant agreement.
4. An executive summary, beneficiary numbers, and responses to performance measures as submitted by the grantee.
5. Any applicable attachments submitted by the grantee as part of the reporting process.

### **FY20 Closed Grant Selection Criteria**

The criteria used for selecting the grants in this report were:

- a. Only FY20 closed grant projects (Authority Grants and MHTAAR grants)
- b. Only FY20 closed grants over \$100,000 (including grants awarded from an unallocated bucket in a Non-Focus Area or Focus Area line item; i.e. Partnerships or Beneficiary Employment and Engagement program grants)
- c. Only FY20 closed grant projects recommended for continued funding in the FY23 budget. (NOTE: If the FY23 recommendation is below the \$100,000 threshold, for example, a project is ramping down, the grant is not included in this report)

There were 36 grants that met the criteria and are included in the report.

## **Trust Grant-Making in General**

Annually the board of trustees approves a budget that includes expenditures from the Trust Settlement Income Account for the awarding of grants and contracts to ensure an integrated comprehensive mental health program for the state and to improve the lives of Trust beneficiaries<sup>1</sup>. In some cases, the approved funding is allocated to a specific organization (i.e. the Department of Health and Social Services or Alzheimer’s Resource Agency) and in other cases the funding is approved, but not to a specific organization. These “unallocated buckets” of approved funding (i.e. Partnership funds) are approved and awarded to grantees throughout the fiscal year. Depending on the dollar amount of the grant, they are approved by the board of trustees, the program and planning committee or the chief executive officer.

On average the Trust annually awards over \$20M in individual grants, as outlined in our recent [FY20 Grant Investment report](#). These grant awards can range from \$2,500 for a conference sponsorship to over \$500,000 for a program or service that supports Trust beneficiaries. The types of grants the Trust awards include:

- Capacity Building
- Capital - Equipment
- Capital - Construction
- Conference/Sponsorships
- Data Planning
- Direct Service
- Outreach
- Workforce Development/Training

In addition, for each grant award there is a signed grant agreement between the Trust and the grantee organization. The grant agreement includes:

- General Agreement as to the purpose of the grant
- Project Description
- Project Performance Measures
- Budget Agreement
- Payment Provisions
- Reporting Requirements

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<sup>1</sup> Alaskans who experience mental illness, developmental disabilities, substance use disorders, Alzheimer’s disease and related dementia, and traumatic brain injuries.

## **Project Performance Measures**

Individual grant project performance measures are established for every grant and included in the grant agreement. Generally, performance measures are developed by Trust staff with the grant recipient. This ensures the necessary beneficiary data is reported given the scope and type of grant award and that the data is within the grantee's capacity to track. As a starting point, the Trust uses the Results Based Accountability (RBA) framework<sup>2</sup> when developing performance measures. This framework is based on three core questions (1) How much did we do? (2) How well did we do it?, and (3) Is anyone better off? This framework is applicable for the majority of Trust grants, but not all (i.e. capital grants).

Using the RBA framework as the foundation, additional factors are considered when developing and establishing performance measures, such as the grant award amount and the grantee's capacity to collect, analyze and report data. In summary, the RBA framework grounds the development and establishment of grant performance measures, but there are other factors that are considered for each grant award.

## **Project Performance Measure Data**

Project performance measure data is generated and submitted to the Trust by the grantee as outlined in the individual grant agreements. The information can and does vary depending on the grant type, the data required as well as the individual grantee's data collection infrastructure, staff capacity, and ability to analyze and interpret the data. As a result, there is performance data reporting variability across grantees and individual grants cannot and should not be compared to one another.

When a grant report is submitted, Trust staff review the report against the performance measures outlined in the grant agreement. If there are questions or if there is missing information the assigned Trust staff to the grant, reaches out to the grantee to discuss the identified question or issue. This communication accomplishes three key things. First, it develops or strengthens the Trust/grantee partnership. Second, it provides an opportunity for Trust staff to understand the context and any potential unidentified capacity issues that may have contributed to the question or issue. Finally, it provides the opportunity to assist the grantee in understanding the Trust data needs and possibility to clarify or resubmit information in the report. In the end, this generally results in better data on the project and a greater understanding of beneficiary impact.

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<sup>2</sup> Mark Friedman

## **Staff Analysis**

The Trust is a highly engaged grant making organization, meaning Trust staff often are connecting and working with the grantee from the point of approval through to the close of the grant award. Thus, the submitted grant report itself is one element that Trust staff considers when performing their analysis of a grant project. Other elements include grantee/Trust communication over the grant period; identified factors outside the grantee's control that may have positively or negatively impacted grant performance (i.e. staff turnover, state regulatory or funding changes; changes in leadership priorities, etc.); confidence in grantee leadership; and historical grantee performance. These elements may or may not be included in a grant report, but when applicable are considered and included by Trust staff in their final analysis of the grant.

## **Summary**

We hope this information helps to frame the context and understanding of the information that is included in the grant reports that follow. In addition, we hope that the information will assist trustees in understanding the identified Trust FY23 budget recommendations and the related projects. Trust staff looks forward to answering any questions trustees may have, and engaging in a dialogue about the report.

Project: Mental Health & Addiction Intervention Focus Area

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**Project Title:** Recover Alaska

**Grantee:** Sultana New Ventures LLC dba The Foraker Group

**Fund:** Authority Grant

**Geographic Area Served:** Statewide

**Project Category:** Capacity Building

**Years Funded:** FY16 to Present

**FY20 Grant Amount:** \$100,000.00

**High Level Project Summary:**

Recover Alaska is a partnership of private and nonprofit funders who have come together to fund strategies guided by a governing body comprised of the Trust, Mat-Su Health Foundation, Rasmuson Foundation, Southcentral Foundation, Providence Health Systems Alaska, Department of Health and Social Services and University of Alaska Anchorage. The overarching goal of this partnership is to reduce the negative impacts of alcohol abuse in Alaska.

Recover Alaska is effectively leveraging political and funding capital to innovatively tackle alcohol addiction and its consequences in Alaska through a variety of strategic approaches including changing social norms, stigma reduction campaigns, media partnerships and improving the state of Alaska's alcohol statutes.

This unique partnership initiative is recommended to receive continued Trust funding to maintain effective coordination to combat the negative impacts of alcohol in Alaska and to leverage the influential leadership to support strategies that will result in long term reduction in Alaska's high alcohol abuse rates, cost and associated negative harms. Trust staff recommend continued funding for this initiative in FY23.

This partnership with Recovery Alaska aligns with Goal 4 of the Comp plan which is focused on prevention and treatment for drug and alcohol misuse through collaboration, effective and informed strategies- specifically Objective 4.1, increased awareness and improved knowledge to reduce impacts of drug and alcohol use.

**Project Title:** SAPT: Recover Alaska (FY20)

**Staff Project Analysis:**

Recover Alaska continued to focus substantial energy, advocacy and staff time on the Title 4 Alcohol Statute rewrite, which is a comprehensive review and update of the statutes that govern the licensing, sale, and distribution of alcohol in Alaska. The recommended changes to the statute was derived from more than 7 years of work with participation from alcohol industry representatives, public health, public safety and state philanthropic leadership. While Recover Alaska and partners were successful in passing some elements of Title 4 updates in 2016, in particular the composition of the Alcohol Beverage Control Board and elements related to minor consumption penalties, Recover Alaska and partners continued to advocate for legislation passage of the comprehensive statute rewrite yet were unsuccessful during the FY20 legislative session. Recover Alaska leadership will determine strategy for the FY21 legislative session and level of advocacy effort deemed appropriate given anticipated changes to the legislative body.

Recover Alaska was a primary proponent of successful passage of an alcohol tax in Anchorage. Advocacy efforts engaged community stakeholders to develop recommendations presented to the Anchorage assembly about investment in substance use related prevention and treatment, upstream prevention, support for law enforcement and diversion from use of police in response to individuals in mental health crisis.

Recover Alaska submitted and was awarded a statewide coalition grant focused on alcohol prevention and alcohol-related advocacy work. Recover Alaska progressed with implementation and engagement of coalition partners across the state to initiate implementation on coalition related strategies. The grant period began July 1, 2020.

RA continues to effectively leverage political and funding capital to innovatively tackle alcohol addiction and its consequences in Alaska. RA will continue to progress on existing strategies and develop new strategies that fit within the broad categories identified by the steering committee. This unique partnership initiative is recommended to receive continued Trust funding to maintain effective coordination to combat the negative impacts of alcohol in Alaska and to leverage the influential leadership to support strategies that will result in long term reduction in Alaska's high alcohol abuse rates, cost and associated negative harms.

This partnership with Recovery Alaska aligns with Goal 4 of the Comp plan which is focused on prevention and treatment for drug and alcohol misuse through collaboration, effective and informed strategies- specifically Objective 4.1, increased awareness and improved knowledge to reduce impacts of drug and alcohol use.

**Project Description:** Recover Alaska (RA) is an initiative to reduce the negative impacts of alcohol abuse in the state of Alaska. Sultana New Ventures LLC dba The Foraker Group serves as fiscal sponsor for Recover Alaska. Informed by a multi-sector, 22-member coalition, Recover Alaska is focusing on making systems, policy, statutory and practice changes that will lead to long-term improvements. The funding from the Trust will support the operations expenses for the executive director and associate program manager including personnel, technical assistance and travel. This request also includes the transfer of DHSS funds (\$100,000) that is designated for funding the strategies.

Alaska ranks second in the United States for its high rate of alcohol-induced mortality (15.2 deaths per 100,000 individuals) for all Alaskans in 2012, and 60.8 per 100,000 for Alaska Natives, compared to 7.6 per 100,000 in the United States. Alaska has the highest percentage of American Indian and Alaska Natives, (19.5%), considered by the CDC to be a vulnerable population. The Healthy Alaskans 2020 survey shows that alcohol use and abuse is the top health issue important to Alaskans. Recover Alaska sees alarming linkages from the prevalence of alcohol abuse to other determinants of health including forcible rapes, child sexual assault, violence and adverse childhood experiences. While alcohol abuse is a key determinant of health in Alaska, interventions and policy development follows fragmented, siloed funding streams. Recover Alaska seeks to align six major funders to create a strategic, effective long-term campaign that produces change in social acceptability and prevalence of excessive alcohol consumption. The two beneficiary groups impacted by this project are chronic alcoholics and substance abuse users and secondarily persons with mental illness and families and caregivers.

The five strategies for implementation in FY15-17 primarily focus on changing statewide cultural norms around alcohol use and readying the state to shift policy to reduce consumption. The five (with lead partners accountable for strategy completion noted) are:

1. Positive Social Norms Campaigns: Development of a positive community norms campaigns for youth that highlights healthy behaviors;
2. Create/mobilize Advocacy Coalitions: Building advocacy coalitions to advance local and state policy changes;
3. Polling: to determine how Alaskans think and feel about alcohol;
4. Partnering with Media: Raise overall awareness of the consequences of excessive alcohol consumption; and
5. Pilot a One-Stop-Shop: Create a resource center for all Alaskans to obtain accurate, reliable information about prevention and treatment.

The approach stems from the governance and staffing structures established to carry out the action plan, which facilitates a certain level of independence from any one funder and allows for shared accountability and control amongst its partners. Sultana New Ventures LLC, a subsidiary of The Foraker Group, houses the initiative's general operations, employing two full-time staff --an executive director and associate program manager, who guide the overall collaborative. The Executive Director, Tiffany Hall, began January 2016.

RA created a three-tier governance model for making decisions and getting the strategy work done. The 22-member Steering Committee ([www.recoveralaska.org/about](http://www.recoveralaska.org/about)) advises, develops, steers and champions RA's work at the executive level. The Funding Partners Group, composed of the CEOs or heads of the funding partner organizations, provides general direction, establishes long-term priorities for RA and serves as RA's primary external advocates. The Oversight Committee, composed of designated agency representatives of the funding partner and lead organizations, provides oversight, and, in many cases, direct implementation of the strategies.

**Grantee Response - FY20 Grant Report Executive Summary:** Recover Alaska is a statewide action group working to reduce excessive alcohol use and related harms. We have three individuals on staff and a Jesuit volunteer with the organization- Tiffany Hall, Executive Director; Jess Limbird, Program Manager; Amanda Voshell, Associate Program Manager; and Molly Mattingly, a Jesuit volunteer. We work in collaboration with several contractors to ensure that work tasks are successfully completed.



We currently are implementing four strategic initiatives. The first strategy focuses on Prevention and the establishment of a statewide Alcohol Alliance to establish collective impact outcomes and best practices. The second strategy, Advocacy and Policy, has been concentrating on the passage of an alcohol tax in Anchorage and SB52, which is a comprehensive bill revising Title IV regulations. The third initiative is Access to Care, which focuses on building and executing a statewide workplan. The fourth initiative, Social Norms, engages a network around a health marketing campaign to improve the alcohol scores in Alaska.

The Prevention work established an Assessment and Data work group who helped to write an RFP for our assessment contractor, identified an assessment contractor, hosted a virtual all-Alliance meeting, hosted a two-day in-person event in Anchorage to engage partners around strategic planning, recruited new members to the Alliance, and identified and contracted with a capacity-building Technical and Training Assistance entity- Faces and Voices of Recovery and talked with two additional entities about additional workforce development/capacity-building for preventionists in Alaska. One of the challenges is organizing a statewide alliance that will interface with existing networks and services.

Circle Forward Partners facilitated a contractor's meeting among then-identified contractors- McDowell Group (evaluation), Walsh|Sheppard (design and web development), Recover Alaska and themselves. Because the nature of our work is overlapping and iterative, it is important that we are not setting up methods of communication to be hub-and-spoke, with Recover managing all communication, but rather that we empower our contractors to talk with one another to ideate, problem-solve, and work collaboratively.

The Advocacy and Policy strategy focused on two major initiatives, the Alcohol Tax Proposition 13 and SB52. Tiffany Hall led the effort with many partners and the Municipality of Anchorage voters passed Prop 13 in April 2020. The alcohol tax will begin in February 2021 and the next steps will be to ensure the money collected will go to the stated purposes of Public Safety, Domestic Violence, Homelessness and Substance Treatment. SB52 passed the Senate in February 2020 and the House Finance Committee in March but the Legislature paused early in the session due to COVID 19. The hope is if the legislature has a special session, the bill will be passed by the House. The bill has been a work in progress for eight years.

The Access to Care initiative has developed a workgroup and plan and is in the process of hiring a facilitator. The plan includes educating the workgroup on the 1115 waiver for SUD treatment and to set a goal for measuring access to care. The group will also be exploring other partners who are working on this issue to see if we can combine resources and not duplicate efforts.

The last strategic initiative is the Social Norms. This work has been put on pause until we can design a Theory of Change and complete research on social norms around the country. The plan is to convene the Governance and Operations Councils in the fall to map our strategies for 2021.

Communication efforts are ongoing and include our social media presence, which currently has over 18,000 followers across all three platforms. We send out a monthly e-newsletter and work to highlight events, partnerships, and positive social norms through media collaboration. National Recovery Month in September is also a national celebration and education effort around recovery. We held events in Anchorage and Fairbanks and worked closely with other agencies and groups around the state to amplify their efforts as well.

Recover Alaska has experienced success in completing work tasks, building our network, and growing our presence around the state. This success can be attributed to a number of equally important factors. The leadership and vision of Recover Alaska's Executive Director, Tiffany Hall, and the organization's Governance and Operations Councils are prominent among them. We were also successful in getting a Jesuit Volunteer (JV) for a year who contributed to the advocacy and policy initiative. Her one-year commitment will be completed in July and a second JV has accepted a position beginning in August. The dedication of our staff, partners, and network all contribute to the exponential growth of the movement to re-define our state's relationship to alcohol.

**Number of beneficiaries experiencing substance misuse reported served by this project in FY20:**  
1,742

**Performance Measure 1:** How much did you do?

a) Number of Trust beneficiaries served, broken down by Trust beneficiary category.

**Grantee Response to Performance Measure 1:** For the grant period, we served 1742 individuals self-identifying within the mental illness and chronic alcoholism Trust beneficiary categories. Recover Alaska does not provide direct services to our constituents. Our closest measure of these categories comes to us through United Way's Alaska 2-1-1 call center, who do collect this information from those seeking resources. Secondary beneficiaries were quantified from evaluating social media reach through engagement, which include likes, shares, and comments. They represent a mix of primary beneficiaries that are self-identifying but for whom we have no formal tracking measure, and those who are family members and caregivers to individuals within the mental illness and chronic alcoholism Trust beneficiary categories. There were 16,140 followers on Facebook on November 1, 2019 and as of April 16, 2020 we now have 17,243 followers. We earned 1,103 new followers in that time period. A better number to report is likely 'reach'. Those are the number of people who saw our posts during that time period. Since we pay to promote our content, our posts are seen by a larger group than those who just follow our page. That number is 118,000 people. It is worth denoting that we ran a campaign during that time so the numbers for March and the first week in April are about 4 times what is normal.

**Performance Measure 2:** How well did you do it?

- a) Provide a narrative describing the timeline, activities, successes, challenges, and any lessons learned during the project.
- b) Provide a copy of the evaluation (contracted by Alaska Evaluation and Research Services).

**Grantee Response to Performance Measure 2:** Recover Alaska has been able to increasingly do more work during the period of November 2019-April 2020. Recover Alaska now has three full-time employees and one Jesuit volunteer working to fulfill the mission of reducing excessive alcohol use and harms. This growth is a success, but because of the amount of work that we are tasked with doing, our limited capacity can also be a challenge. We continue to rely on external contractors for program support for all our initiatives. Managing those relationships and the work that happens with those contractors continues to be a positive challenge, which offers us opportunities to grow both professionally and personally through learning effective communication styles and flexing our emotional intelligence. Proposition 13 passed which was a huge effort and success. The challenge will be to ensure the future funding will be used to support substance treatment, fund first responders, and provide funding for the homeless needs. The DBH Prevention grant has made progress in forming the statewide Alliance and has developed an assessment survey and has a facilitation and evaluation project through UAA.

According to a 2018 poll by SSRS, 20% of the state has heard of Recover Alaska. People come to the table because they have been personally affected by the addiction epidemic; they stay because they are inspired by what recovery has to offer not only individuals but also communities. There are real lessons to be learned in the process of recovery, ones that can be applied to the systems change work.

A copy of the final report from Alaska Research and Evaluation Services is attached.