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PENNSYLVANIA'S HERITAGE AREAS PROGRAM: THE NEXT FIVE YEARS

A Strategic Plan for 2015-2020

A plan for Pennsylvania's Heritage Areas, HeritagePA and the Department of Conservation and Natural Resources

November, 2015

ACKNOWLEDGMENTS

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Photography throughout this document represents the many events, activities and attractions found in Pennsylvania's Heritage Areas.

PENNSYLVANIA'S HERITAGE AREAS PROGRAM: THE NEXT FIVE YEARS — A STRATEGIC PLAN FOR 2015-2020

SECTION 1

Introduction

Pennsylvania's Heritage Areas have historically been essential partners in preserving the rich, unique history and heritage of Pennsylvania. In 1989, Pennsylvania's Heritage Areas were created to celebrate and protect the Commonwealth's industrial legacy.

The number of Heritage Areas has since expanded to embrace all aspects of Pennsylvania's heritage, and to tell its story to visitors. The twelve Heritage Areas, five of which also have federal designation, cover over 80% of the Commonwealth, in 57 of its 67 counties. All but Lackawanna Heritage Valley operate as nonprofit, 501(c)(3) organizations.

Heritage Areas are the "go-to" community development agencies in much of Pennsylvania due to their proven expertise in and unique understanding of community revitalization, tourism attraction, business growth and heritage preservation.

The value of Heritage Areas, and that of the Department of Conservation and Natural Resources (DCNR) which supports them, is well recognized by those working in any of those fields. Their value needs to be broadly and effectively communicated to other constituencies.

In 1995, the Heritage Areas developed a statewide nonprofit association, now known as HeritagePA, to speak with a broader voice as well as to learn from one another's best practices. HeritagePA also focuses on ensuring the Heritage Areas Program receives the resources needed for sustainability. To that end, a strategic plan is needed to productively direct the work of HeritagePA and to strengthen Pennsylvania's Heritage Areas Program.

Historically, the Program has been very successful, but it remains impacted by uncertainty in funding levels. Implementation of this strategic plan will focus both DCNR and the Heritage Areas on a shared vision and collaborative plan to keep the Program relevant, valuable, and sustainable.

Supported by DCNR funding, HeritagePA selected a consulting team to lead the planning effort with input from DCNR staff and Heritage Area Managers.

Pennsylvania's Heritage Areas Program: The Next Five Years - A Strategic Plan for 2015-2020, offers recommendations for strengthening the Program and ensuring the growth and viability of the Commonwealth's Heritage Areas.

Pennsylvania Heritage Areas

Map produced by Gecko Group, Inc.

SECTION 2
Heritage Areas Program

Background & History

The Heritage Areas Program was established within DCNR to identify, protect, enhance, and promote Pennsylvania's historic, natural, cultural, and scenic resources; and to stimulate community revitalization and economic development.

Heritage Areas exist in large and varying landscapes. They share common goals of promoting and marketing their areas in the present and conserving them for the future, but their methods differ depending on geography, strategic need, and organizational capacity. Flexibility is always needed in the Heritage Areas Program to meet the differing needs of each region. The differences in cultures and communities, both urban and rural, throughout the Commonwealth, require a nimble program with a wide spectrum of approaches. Accordingly, the nature of their work is bottom-up, grassroots and directed by their community partners.

Since 1989, Pennsylvania's Heritage Areas Program has served as a model of success and has been emulated by other states which launched similar grassroots, community-focused heritage programs. The history of its formation and its growth offers a clear understanding of the challenges for the Program as it transitions into its third decade of operation.

This history is more fully outlined in Appendix I.

A Shared Vision
In the planning process, stakeholders from PA Heritage Areas and DCNR were asked to articulate a Vision Statement for the Program.

Vision Statement:
"By 2020, Pennsylvania's Heritage Areas Program is recognized, trusted, and celebrated as a key component of Pennsylvania's cultural and economic vitality, thereby warranting dedicated program funding and collaborative state support. "

A Shared Mission
Although challenging to distill the multi-faceted work of Pennsylvania's Heritage Areas, a Mission Statement was also developed during the strategic planning process.

Mission Statement:

"Pennsylvania's Heritage Areas exist to develop, build, revitalize and restore the Commonwealth's heritage tourism infrastructure. They are collaborative grassroots catalysts that empower entrepreneurs, small business, rural communities, cities, and our citizenry to survive and thrive. Heritage Areas are image makers and economic generators crucial to bolstering both Pennsylvania's core communities and economic vitality."

SECTION 3
Purpose Of Strategic Plan

Planning Process and Organization

Heritage Areas operate and are funded as a formal program under DCNR. For the Program to grow, it is imperative that HeritagePA, the Heritage Areas, and DCNR agree on a shared vision and collaborative plan for working together in the future. Like all state agencies, DCNR must continually justify its program expenditures. Tighter fiscal constraints challenge the Program directly, and make the articulation of value, relevance and impact essential.

This strategic plan offers a roadmap for the Program by focusing on five key focus areas chosen from stakeholder input.

For each focus area, priority tactics are outlined with responsible parties and a general implementation timeline. Indicators of successful attainment are noted for each focus area.

Over the past several years, Heritage Areas have struggled. A lack of resources has diminished their ability to address community needs and hindered planning efforts. To advance and strengthen the Program, increased recognition of its value is needed among the general public, legislators, the administration and key state agencies. A communications strategy is outlined to address that need.

The consultant team, led by McCollom Development Strategies, LLC with SWELL, LLC, and Mackin Engineering, began its work in late 2014 and completed the strategic planning work in October 2015.

The team worked closely with three selected representatives from the Steering Committee: Jane Sheffield, Executive Director of the Allegheny Ridge Corporation; Donna Holdorf, Executive Director of the National Road Heritage Corridor; and Michael Piaskowski, Section Chief, Landscapes and Educational Services, DCNR's Bureau of Recreation and Conservation.

The project was managed by HeritagePA; and a nine person Steering Committee directed the efforts and provided guidance and oversight. Monthly progress reports ensured prompt adherence to the contract.

Members of the Steering Committee are listed in the Acknowledgments section of this plan. In the course of this planning process, the consultant team reviewed over a dozen documents relating to the Program and its history. (Appendix II)

Over three dozen stakeholders, including the 12 Heritage Area Managers, several affinity organizational partners, Heritage Area board members and DCNR staff, past and present, were interviewed. An analysis of the strengths and challenges of the Program was gathered from additional input from the Heritage Areas, DCNR staff, affinity partners and collaborators.

The survey instrument used and Key Findings are included in Appendix III.

A tool to measure program success was a plan objective in the original Request for Proposal. As the planning effort advanced, it became clear that agreement on an equitable and effective program measurement tool was not currently possible. Due to the extensive research undertaken regarding evaluation metrics, the Steering Committee suggested inclusion of the draft evaluation section as an appendix for possible future reconsideration.

Evaluation methodology of project work and tactics for strengthening management entities have been distilled from this earlier work and are included as Appendix IV.

SECTION 4
Main Components Of The Plan

KEY STRATEGIC FOCUS AREAS AND COMMUNICATIONS PLAN

The Heritage Areas Program was expressly developed with limited regulatory oversight. It received dedicated funding for operations as well as project grants. This created flexible, creative, grassroots management entities which could undertake a variety of programs and projects based on regional needs. How to fairly evaluate project grant applications and equitably fund operations of entities with widely differing focus and needs has always been challenging.

Essential goals for the Program and for the individual Heritage Areas are to: maintain financial stability; equitably distribute funds based on need and performance; set a standard of excellence in organizational management; and articulate value and relevance to key constituencies.

Actionable steps have been identified to meet these goals and have been synthesized into key strategic focus areas set forth in the table below with timelines for recommended completion. "Short Term" assumes an immediate launch of the suggested tactics upon approval of the plan, with completion within the first year. "Mid Term" assumes completion within the next three years, and the "Long Term" timeline is either an on-going project or one with a start and finish within 4-5 years.

The other main component of this plan is a comprehensive communications plan and implementation schedule which is also outlined in this section.

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
INCREASE PROGRAM VISIBILITY				
Position the Program as an essential service critical to maintaining and enhancing Pennsylvania's quality of life and economic vitality.	Reestablish the Inter-Agency Task Force (ITF)*	DCNR HeritagePA	Short term	ITF established with guidelines in place. Multiple state agencies engaged with regular attendance by selected representatives.
	Implement, track and evaluate the Heritage is Now campaign.	Heritage Area Managers HeritagePA DCNR	Short term	Implementation schedule is followed, target metrics established, evaluated quarterly and corrected as needed.
	Establish a Heritage Area Task Force consisting of Heritage Area Managers, DCNR, and HeritagePA.	Heritage Area Managers HeritagePA DCNR	Short term	Heritage Area Task Force convenes regularly to address issues related to the Program. DCNR, HeritagePA and Heritage Areas engaged in active participation.
	Represent PA's Heritage Areas on Pennsylvania's Association of Tour and Travel (PATT), PA Historical and Museum Commission and other state boards and initiatives as relevant to heritage area work.	Heritage Area Managers HeritagePA DCNR	Mid term	HeritagePA is an active member of PATT and other tourism related initiatives. HeritagePA and DCNR meet with DCED to discuss the importance of the Program to the state's tourism infrastructure.
	Develop an interstate signage program.	Heritage Area Task Force ITF	Long term	Sign guidelines are created and accepted by state and federal transportation agencies. Signs are installed for 50% of Heritage Areas.

* The Interagency Task Force will review Heritage Area 3 year work plans, offering feedback on possible intersections with their respective agencies. Collaboration among state agency work is a lofty goal, and to be achievable must convey the value of such interactions. An agreement must be made for consistent representation at no more than twice annual meetings. The agenda must be thoughtfully articulated as a win-win for the agencies asked to participate.

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
CULTIVATE CULTURALLY RICH BOARD AND STRONG MANAGEMENT ENTITIES				
Management entities are bolstered through the cultivation and engagement of culturally rich boards.	Management entities and HeritagePA strive to meet basic recognition benchmarks of Pennsylvania Association of Nonprofit Organizations (PANO) Standards of Excellence 2.0® Program.	Heritage Area Managers HeritagePA DCNR	Mid term	More than 50% of Heritage Areas, including HeritagePA, meet and maintain the basic PANO 2.0® recognition requirements. DCNR meets basic standards as well.
	DCNR actively engages in supporting Heritage Areas and HeritagePA in achieving Standards of Excellence.	DCNR Heritage Area Managers	Short term	DCNR facilitates access to best management practices, resources and trainings. DCNR supports a group membership with PANO through HeritagePA.
	HeritagePA by-laws are reviewed and updated.	HeritagePA	Mid term	By-laws are updated and followed.

Appletini Photography

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
POSITION HERITAGE AREAS PROGRAM FOR ORGANIZATIONAL AND FINANCIAL STABILITY				
Heritage Areas strive to achieve the highest standards in operations and financial stability.	Management entities participate and contribute in legislative outreach efforts.	Heritage Area Managers	Short term	All Heritage Areas are actively involved with legislative outreach defined as legislative support for programs, attendance at events, partnerships in initiatives, advocacy.
	Funding methods are evaluated to ensure equitable practices are in place to support routine management needs, project impact, and the viability of the system as a whole.	Heritage Area Task Force DCNR	Mid term	Heritage Area Task Force studies funding issues and methodologies. Standard funding procedures are established and recorded as program policy in the updated Program Manual.
	Examine possibility of amending Keystone legislation to explicitly allow funding of Heritage Areas.	Heritage Area Task Force DCNR	Short term	Analysis is completed. Action taken if determined to be feasible.
	Review all new and existing funding sources for applicability to Heritage Areas Program.	Heritage Area Task Force DCNR	Mid term	Regular review of applicability of funding sources for Heritage Areas Program funding.
	Management entities advance business development plans to address need for matching funds, financial partnerships and robust membership program.	Heritage Area Managers	Mid term	Strategic and focused business development plans direct the efforts of the Heritage Areas.

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
UPDATE AND STREAMLINE POLICIES AND PROCEDURES				
Administrative policies and procedures are examined and updated to facilitate efficient and effective workflow.	The Heritage Areas Program Guidelines are updated to include policy on management action plan updates, funding practices, border expansion/contraction, adoption of additional Heritage Areas, de-funding existing Heritage Areas and analysis of the "Five Areas of Focus".	Heritage Area Task Force DCNR	Mid term	Heritage Areas Task Force engaged in policy revision and creation. Program manual brought up to date and approved by DCNR. Management Action Plans are updated to accomplish only major revisions to mission, boundaries, founding principles, etc.
	Grant management workflow is evaluated from start to finish with an eye toward identifying efficiencies.	DCNR Heritage Area Task Force	Short term	Time between grant submission and award is decreased. Administrative processes are streamlined. The need for management entities to draw lines of credit to support operations is reduced or eliminated.
	Update Partnerships Program Liaison standard operating procedure to encourage regular interaction between Bureau of Recreation and Conservation (BRC), Regional Offices, DCNR and Heritage Area Managers.	Heritage Area Task Force DCNR	Mid term	Heritage Area Task Force examines the issue. The standard operating procedure is revised. BRC Regional offices and Heritage Area Managers have a clear understanding of communication expectations. Managers and Regional Offices develop and maintain informative and collaborative relationships.

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
ESTABLISH BASIC PROGRAM REPORTING, EVALUATION AND FEEDBACK				
Develop a standard system to establish and track organizational priorities and initiatives.	Management entities develop a three year work plan (at minimum) that communicates program goals and success indicators.	Heritage Area Managers	Short term	Management entities develop and ratify a three year work plan. Plans are reviewed and updated annually by the management entity.
	ITF reviews three year work plans for possible partnership opportunities and project intersections	ITF	Mid term	ITF convenes at least once a year with high level, consistent representation
	Heritage Area Managers develop an approximately one-year work plan within the DCNR Grants Portal to serve as their annual application for funding.	Heritage Area Managers	Short term	One-year work plans are submitted as part of funding request.
	The one-year work plan is used to track delivery of outputs and outcomes.	Heritage Area Managers DCNR	Short term	DCNR develops a system to track implementation of outputs and outcomes, preferably through an electronic means tied to the grant application system. System is implemented and becomes the reporting standard.
Implement meaningful, efficient and comprehensive program evaluation and feedback methods that do not tax the management entity or DCNR reviewer.	DCNR develops a standard closeout template to capture information on project outputs and outcomes as well as associated qualitative outcomes and actual match amounts	DCNR Heritage Area Task Force	Short term	A final report template is created and enacted.
	The results of the closeout reports are published.	DCNR	Short term	Actual match amounts are captured in RACERS for all projects. Closeout reports or success stories are published electronically as part of the communications plan.

STRATEGIC FOCUS AREAS	STRATEGIC PRIORITIES	RESPONSIBLE PARTIES	TIMELINE TO INITIATE	SUCCESS INDICATORS
ESTABLISH BASIC PROGRAM REPORTING, EVALUATION AND FEEDBACK				
	Explore the use of technology to streamline progress and final reporting processes.	DCNR	Short term	DCNR work group is established to explore the possibility of using grants portal and RACERS grant management system to streamline reporting and closeout processes.
	DCNR periodically meets with management entities to review program direction, initiatives, departmental priorities, issues and concerns.	DCNR Heritage Area Managers	Short term	DCNR formally meets with each management entity at least once every three years.
	DCNR is evaluated by program partners at least every two years to gain and address feedback into program operations.	DCNR HeritagePA	Short term	A feedback survey is created and implemented. Results are genuinely considered and corrective measures implemented.
	Economic impact studies are regularly completed throughout the system.	DCNR	Mid term	Heritage Areas establish key sites within their service areas to regularly collect visitor impact information. Once a sufficient amount of visitor information is collected, consultants are hired to analyze and report the data.

COMMUNICATIONS PLAN

Development of a unifying message is essential to the successful implementation of a long-range communications plan for Pennsylvania Heritage Areas. The plan defines a single, collective message that reflects the Heritage Areas' contemporary mission. Adaptable, it can be segmented for key audiences, individual Heritage Areas, and used in partnership with major state agencies, namely DCNR and DCED.

The plan's success depends on Heritage Areas and HeritagePA, taking more measurable and productive communications' actions, frequently, consistently, and efficiently throughout the year focused on appealing to consumers, influencers/decision-makers, and internal audiences. A working Communication Actions Calendar accompanies this plan.

Priorities in Communications

Define Lead Communicator: Establish and empower a leading voice for PA Heritage Areas.

Define Core Message: Establish a collective communications campaign and framework.

Define the Tools for Communications: Establish and sustain the basic communications infrastructure and technology.

Define Success & Progress: Establish a consistent process of measurement and reporting of communications activities among Heritage Areas and their statewide partners.

Lead Communicator: HeritagePA

HeritagePA is best positioned to create and sustain a long-range communications plan. Certain human and financial resources, as detailed in the plan, must be added to HeritagePA to assure successful implementation and consistency and be adaptable to changing conditions and priorities.

As the lead communicator, HeritagePA must have a designated Communications Lead (contractor or staff) to steward ongoing content development and distribution. That lead will measure, report on, and adapt communications activities on at least a weekly basis with monthly updates and recommendations on future communications strategies and tactics.

The accompanying Communication Actions Calendar provides a road map for HeritagePA's Communications Lead to follow and sustain.

The Core Message: Heritage is Now

The core message purpose is to build a simple, flexible, consumer-oriented, and forward looking rallying cry and call-to-action. "Heritage is Now" is a brand expression for the 21st Century on which a contemporary communications plan, process, and activities can be built.

"Heritage is Now" positions Heritage Areas as places of continuous discovery - and re-discovery - for those who live in or visit - drawing on the principles of history and conservation, while speaking to the modern and evolving work.

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"Heritage is Now" is also a message that can be segmented for all Heritage Area audiences, using certain tools/channels, support points, talking points, and calls-to-action: including consumer audiences; and influence audiences: policy-makers, press, and federal, state and local government partners.

"Heritage is Now" is adaptable to individual Heritage Area communications and promotional activities in all regions of the state. Individual Heritage Areas can use "Now" as a platform to speak with one voice for Heritage partners across the Commonwealth and to bring attention to the broader work and needs of all regions. Similarly, in partnership with individual Heritage Areas, HeritagePA can adapt the "Now" branding and messaging for local businesses and supporters, especially those in key areas and corridors.

Finally, "Now" is a platform on which to build partnerships with tourism marketers at the state, regional, and local levels. As tourism marketers seek to understand the current and future work of Heritage Areas and effectively partner and champion the Heritage Area message, products, and experiences, "Heritage is Now" is a simple and tourism-friendly way to capture the essence of Heritage Areas in the contemporary travel landscape.

Communication Actions: Reaching and Engaging Audiences Consistently

In order for HeritagePA to implement a sustained and productive communications plan, it must first establish and cultivate necessary communication tools as follows:

- **Branding:** "Heritage is Now" brand identity and toolkit

- **Website:** HeritagePA.com news and events

- **eCommunication:** "Heritage is Now" monthly newsletter

- **Social Media:** HeritagePA Facebook and Twitter profiles

- **Partner & Press Outreach:** Ongoing information advisories to key statewide partners, Heritage Area Managers, and influential press

- **Measurement & Reporting:** Ongoing monitoring communications reach and engagement

- **Internal Communications:** A process for sharing information and insights among Heritage Area Managers to facilitate productive partnership interaction between quarterly meetings

HeritagePA Communication Actions through 2020

The accompanying Actions Calendar offers detailed steps for implementation. The calendar establishs more frequent and original content creation and distribution to key audiences. Tourism Week 2015 (May 2 - 10) was the launch for HeritagePA communications.

The "Heritage is Now" monthly newsletter functions as a core communications touch point and provides a frequent opportunity for HeritagePA to curate and cultivate timely and relevant Heritage Area work and happenings for the benefit and influence of core audiences. It positions HeritagePA to consistently identify, use, and archive achievements of Heritage Areas.

The "Heritage is Now" monthly newsletter's core content areas include:

- **Header:** "Heritage is Now" art co-branded with HeritagePA: Honor Our Past - Build Our Future

- **Happening Now:** One feature or announcement from a Heritage Area, group of Heritage Areas, or a statewide perspective, including a headline, up to 5-sentence paragraph, and a link to details on HeritagePA.com or to Heritage Area or other webpage

- **Be Here Now:** One feature or announcement from a Heritage Area or statewide perspective on an opportunity to visit and enjoy an area attraction, including a headline, up to 5-sentence paragraph, and a link to details on HeritagePA.com or to Heritage Area or other webpage

- **Now and Beyond:** One feature or announcement from a Heritage Area or from statewide perspective on a conservation or preservation project that will enhance future quality of life for Pennsylvanians, including a headline, up to 5-sentence paragraph, and a link to details on HeritagePA.com or to Heritage Area or other webpage

- **Now You Know:** A single fact on the economic impact of Heritage Areas from a Heritage Area or a statewide perspective, including a headline, 1-sentence description, and link to details (if available) or source information

- **Footer:** Pennsylvania Heritage Areas & Partners including listing of all Heritage Areas by name with hyperlinks to their websites, as well as DCNR logo and link to relevant webpage

The Role of DCNR as HeritagePA Communications Audience and Partner

DCNR has significant assets and audience reach which HeritagePA can use to help build awareness of its work. DCNR plays a critical role extending and bolstering HeritagePA communications by collaborating with the HeritagePA Communications Lead in the following key areas:

• Updating and maintaining content on DCNR's Heritage Areas webpages to assure the content is current and useful. A link should be established to the "Heritage is Now" monthly newsletter sign up and HeritagePA social media channels.

• Cross-promoting content and updates on relevant DCNR social media channels and eNewsletters.

• Providing DCNR spokespeople with up-to-date talking points on Heritage Areas work and achievements.

• HeritagePA must be proactive in regularly informing DCNR about Heritage Area activities and priority issues. The Actions Calendar outlines bi-annual HeritagePA virtual briefings to major state partners and influencers. These meetings should be developed with DCNR to assure that DCNR and HeritagePA speak with one

voice, demonstrating a cohesive mission and shared achievements to a broader audience.

• To sustain productive communication among Heritage Area Managers, the HeritagePA Communications Lead must establish and maintain an accessible and affordable digital channel for information-sharing between quarterly meetings. Google collaboration tools are recommended. Each Area Manager will establish a Google profile to access the Drive documents and Calendar.

Making Progress

The communication activities outlined in this plan offer multiple and easily accessible ways to track audience reach, engagement, and the general progress of HeritagePA communications. The accompanying Actions Calendar details at least quarterly summaries of digital/electronic analytics, including website visits, eNewsletter subscribers/opens, social media engagement, press coverage, and statewide partnership activity.

Collected by the HeritagePA Communications Lead, these summaries should be distributed to the Heritage Areas, DCNR, and all other relevant state agencies and influential audiences.

Resources Needed

In order for HeritagePA to successfully implement and lead Heritage Area communications, an Advocacy and a Communications Lead - either a single person or small firm - must be put in place and empowered to execute on behalf of HeritagePA. The planning team recommends that HeritagePA contract with a dedicated Advocacy individual and/or Communications firm with the following qualifications:

Advocacy:

• Strong legislative and press relationships in capital region

• Ability to serve as point of contact for press and legislative inquiries

• Ability to identify and create opportunities for positive exposure of HeritagePA/Heritage Areas

• Ability to assist HeritagePA with communications strategy on ongoing outreach/advocacy and partnership efforts

• Ability to draft grants (as needed)

• Ability to draft letters and white papers for advocacy initiatives

Communications:

• Base level knowledge of the work of Heritage Areas - their mission, activities, assets, challenges, and relevant audiences

• Ability to frequently communicate with Heritage Area Managers and staff to garner relevant communications content

• Expertise in all eCommunication tools, including email marketing software, social media, and WordPress

• Above average writing and photography skills in order to capture the "big story" from ongoing happenings and activities within individual Heritage Areas

• Readiness to participate as a HeritagePA team member and as a leader or "owner" of HeritagePA communications

• A full year initial communications contract is recommended, with a minimum of 15 hours per week of communications work based on the Actions Calendar included in this plan.

• It is recommended that HeritagePA collect and organize content for its first Annual Report for the year 2015 and distribute that report among Heritage Areas and relevant audiences in Q1 2016, coinciding with the Governor's budget address.

SECTION 5

Conclusion

As Pennsylvania's Heritage Areas transition into their third decade of operation, they do so in an environment which has seen vast technological changes and shifting economic realities. The ultimate audience for the Heritage Areas – heritage tourists and outdoor enthusiasts – now obtains travel information through various media, primarily electronic. Frequent and engaging communication with that audience through these media outlets is vital for continued growth. The altered and more competitive fiscal landscape in which Heritage Areas now operate makes inter-agency cooperation more necessary than ever for continued sustainability.

In order to obtain the resources necessary to fulfill the Mission Statement, Heritage Areas must adapt their work to reflect these new realities. Effective advocacy and communication must be a priority, along with a committed, measurable, but flexible plan for maintaining viable funding for stability through concerted collaborative efforts with DCNR.
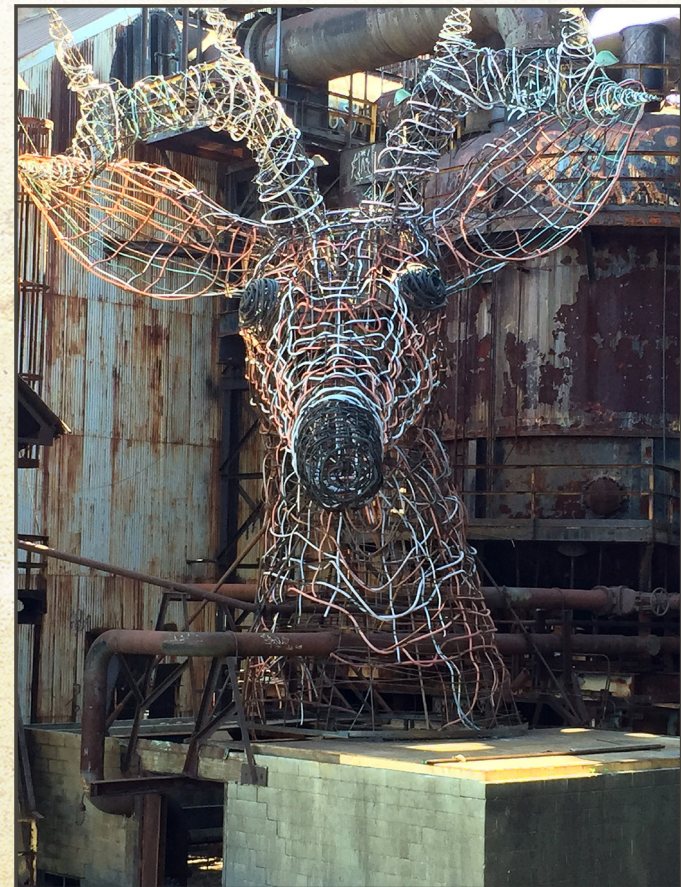
APPENDICES

The Pennsylvania's Heritage Areas Program: The Next Five Years – A Strategic Plan for 2015-2020 is intended as a reference for several audiences with varying amounts of knowledge and experience with the Pennsylvania's Heritage Areas Program. The Appendices section offers additional information for those reviewing this plan as well as for those using the plan to direct Program work.

Appendix I. History of the PA. Heritage Areas Program

Appendix II. Strategic Planning Research

Appendix III. Key Findings from Surveys and Interviews

Appendix IV. Evaluation Metrics

Appendix V. Heritage is Now Communications Calendar

Appendix I. History of the Pennsylvania Heritage Areas Program

Information is provided in large measure from the following documents:

- *History of the Pennsylvania Heritage Areas, prepared for the PA Department of Conservation and Natural Resources, September 2014, by Eleanor Mahoney, M.A.*

- *Overview of the Origin of the Pennsylvania Heritage Parks Program (PHPP) by Allen Sachse, who was at that time, Executive Director of the Delaware & Lehigh National Heritage Corridor*

Since 1989, Pennsylvania's Heritage Areas Program, ("the Program") has served as a model of a success, emulated by other states launching similar grassroots, community-focused heritage programs. The history of its formation and its growth offers a clear understanding of the challenges for the Program as it transitions into its third decade of operation.

In the late 1980s under the Casey Administration, staff of the Department of Community Affairs (DCA), Bureau of Recreation and Conservation became familiar with New York's Urban Cultural Parks program intended to both define and conserve site-specific resources related to cultural heritage.

Similar conversations around the protection of heritage resources were occurring throughout the country. Pennsylvania recognized the need to protect the heritage of the Commonwealth and to interpret that history to boost tourism.   Interpreting the stories of the industrial heritage of Pennsylvania and conserving the remaining industrial sites peppering our landscapes was essential to attract visitors and engage residents.

Working with the National Park Service, key Bureau staff developed a grassroots program to preserve and interpret specific industrial sites. They focused on key themes in the Commonwealth's history: steam driven railroad, the broader historic transportation systems of canals as well as railroads, and the industrial heritage centered in the steelmaking region of southwest PA. This focus led to the development of three projects:

- *Steamtown National Historic site in Scranton focused on the planning and interpretation of the steam driven railroads*

- *Delaware and Lehigh National Heritage Corridor capturing the story of transportation through canals and railroads*
- *Southwestern PA (Industrial) Heritage Preservation Commission was established through federal legislation in the Department of the Interior to coordinate the preservation, promotion and interpretation of sites and stories of southwestern Pennsylvania's industrial heritage.*

One of those key initial stakeholders, Allen Sachse, who became a director of the Delaware and Lehigh National Heritage Corridor, stated the driving public message for all three pilot heritage projects was the same and was noted in the *Overview of the Origin of the Pennsylvania Heritage Parks Program.*

> *"Our heritage is important to us and most importantly to our children. Together we must save and share the stories of our heritage: why our ancestors came here; how much they sacrificed; and how hard they worked to build America. The stories are imbedded in the character of our towns, the resources and beauty of our land, and the traditions of our ancestors. As this area grows and changes we cannot allow our heritage to be lost."*

Larry Williamson, then Chief of the Bureau of Recreation and Conservation, convened an Interagency Task Force to determine the value of launching a statewide Heritage Area program. Williamson recalls that key to the Program's formation was that it be grassroots, flexible, but broad enough in scope to address specific community needs as well as launch regional initiatives, and articulate enough to engage local as well as legislative constituencies. The Heritage Area geography, though, must remain grounded in a compelling and connected story.

Participating on the Task Force was the Pennsylvania Historical and Museum Commission, represented by Brenda Barrett, Director of the Bureau of Historic Preservation. This agency published the *Made In Pennsylvania* report on the dominant and unique role of Pennsylvania in the country's industrial revolution.

Drawing on this document, the Task Force determined the story to tell was that of the Commonwealth's vital role in the nation's industrial growth. From its rivers, canals, and coal, oil and lumber industries, the region was the undisputed leader in the country's industrial development.

The key drivers of the concept quickly developed guidelines for the Program and, through a strong legislative push, succeeded in funding a grant program for regional entities to study the feasibility of a Heritage Area in their respective regions. Anticipating two or three applicants, the Task Force was pleased to receive nine in this initial offering, demonstrating strong interest. In the initial round, the funding awarded focused on feasibility studies to determine specific Heritage Area's geography, theme and strategic direction.

The original process for Heritage Area designation included the feasibility study, followed by the development of a management action plan and an interpretive plan. This work, developed with intensive community input, guided the Heritage Area's efforts. The Management Action Plans (MAP) of each still serve as guides, but Heritage Area managers use annual work plans to outline the day-to-day strategies and tactics of their work.

Eleven of the twelve Heritage Areas are managed and work as 501(c)(3) nonprofits; Lackawanna Heritage Valley is managed by a county authority but also works with a nonprofit organization created for that purpose.

As defined in DCNR's 2009 Heritage Areas Program Manual, the 12 formally designated PA Heritage Areas are:

1. Lackawanna Heritage Valley was the first state Heritage Area designated in 1991. The area was designated a National Heritage Area in 2000. Its geography embraces the watershed area of the Lackawanna River in Susquehanna, Lackawanna, Luzerne counties. It includes the Steamtown National Historical site (one of the three pilot heritage sites in the Commonwealth which led to development of the Heritage Areas Program).

2. The Allegheny Ridge Heritage Area, designated in 1992, interprets the iron and steel, coal and coke, rail road and canal heritage in Blair, Cambria, Huntingdon and Somerset counties.

3. The Delaware and Lehigh National Heritage Corridor, designated as a National Heritage Corridor in 1988 and in 1993, a state Heritage Corridor, focuses on interpreting railroad and canal transportation history through Luzerne, Carbon, Lehigh, Northampton and Bucks counties.

4. The National Road Heritage Corridor was designated by the state in 1994 to celebrate the history, culture and scenery of the historic National Road which in the early 20th century was overlaid in part by U.S. Route 40, through Somerset, Fayette and Washington counties.

5. The Oil Region National Heritage Area was designated as a state Heritage Area in 1994, and a National Heritage Area in 2004, to interpret the story of the birth and legacy of the petroleum industry in Venango and Crawford counties.

6. The Lincoln Highway Heritage Corridor, designated in 1995, promotes the transportation heritage of U.S. Route 30, the first transcontinental highway, as it traverses through Pennsylvania, in Adams, Franklin, Fulton, Bedford, Somerset and Westmoreland counties.

7. In 1995, the Schuylkill River Heritage Area was designated a state Heritage Area and charged with promoting the history and legacy of the Schuylkill River Valley in Schuylkill, Berks, Chester and Montgomery counties as well as the City of Philadelphia. In 2000, it was designated as a National Heritage Area as well.

8. Rivers of Steel National Heritage Area was designated a national as well as state Heritage Area in 1996. It focuses on the industrial heritage of southwestern PA when Pittsburgh and its surrounding region "built the world" as the center of iron, steel, coal and coke production for over a century. This Heritage Area covers the counties of Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Washington and Westmoreland as well as encompasses the Allegheny, Monongahela, Ohio and Youghiogheny river valleys.

9. Endless Mountains Heritage Region celebrates people living with the land in Bradford, Sullivan, Susquehanna and Wyoming counties. It was designated in 1998.

10. Designated in 2001, the Lumber Heritage Corridor embraces the largest geography of Pennsylvania's Heritage Areas covering 15 north central counties to tell the story of the lumbering industry, past and present.

11. Susquehanna Gateway Heritage Area was designated as Lancaster-York Heritage Region in 2001 and focuses on conserving and promoting the rich cultural and natural heritage of the Susquehanna RIverlands in Lancaster and York Counties.

12. The most recent designee, PA Route 6 Heritage Area since 2005, has interpreted the heritage of U.S. Route 6 highway and the region's scenic and natural beauty as it winds through 11 counties in the northern part of the state.

In 1995, the Bureau of Recreation and Conservation transitioned to become a Bureau under the Department of Conservation and Natural Resources (DCNR) with founding legislation that included key components such as preservation to help form the Heritage Areas Program. The fledgling program transitioned with key staff, Allen Sachse, Alan Chace and Larry Williamson who eventually became a DCNR Deputy Secretary.

DCNR focuses on greenways, parks and forest, water and land based trails, natural resources and outdoor recreation. The focus areas of the Heritage Areas are economic development, partnerships, cultural conservation, recreation and open space, education and interpretation. Although not a perfect match in all areas, DCNR and the Heritage Areas have many common goals, complement one another and have the opportunity to strengthen each other.

Pennsylvania Heritage Areas' Five Areas of Focus are defined in the *2009 Pennsylvania Heritage Areas Program Manual* **as:**

Economic Development: *Heritage tourism is used to strengthen regional and local economies. The pathway to reaching this goal can encompass restoration of vacant historic buildings or reuse of industrial sites; preservation and revitalization of downtown commercial districts, to the expansion of advanced technologies in rural areas. Success results in Heritage Areas being attractive places to live and work in sustainable communities.*

Partnerships: *The program was originally launched under the review and direction of an Interagency Task Force and that approach continues to weave through all aspects of Heritage Area work. Heritage Area Managers work with tight resources and changing financial and legislative landscapes on the state level. They thus must create a strong coalition of municipal and civic leaders, businesses, community organizations, educational institutions and engaged residents. Partnerships with other state and national corporations remain essential as well. Examples include: Center for Rural Pennsylvania, Preservation Pennsylvania, the Pennsylvania Downtown Center, Pennsylvania Environmental Council and the National Trust for Historic Preservation.*

Cultural Conservation: *A common imperative of all Heritage Areas is the call to conserve a region's distinctive and varied cultural resources, and to tell the stories of the people that built the industries and led the industrial revolution. A driving force in heritage area development is to celebrate the region's cultural traditions and folk life, as well as to preserve the built environment as a tangible product of the Commonwealth's heritage. Heritage Areas interpret and educate through events, signage, artifacts, visitors centers, and actively promote arts, artisans, and crafters specializing in traditional art forms.*

Recreation and Open Space: *Heritage Areas are often corridors linking people and places. In fact, the transportation story is one that covers the entire Commonwealth. Its canals, rivers, railroads and roads all are integral to Pennsylvania's story and the birth and growth*

of its industrial heritage. A major component of the Heritage Areas is the linkage of natural, recreational and historic sites. Manmade corridors of canals, roads and railroads as well as natural corridors of rivers, trails, and byways (collectively known as greenways) connect essential historic and cultural resources. These corridors are important and significant assets that benefit nearby communities, and offer major recreational and environmental education opportunities for visitors and residents. Protecting these resources, conserving the natural assets and developing a system of trails and greenways is central to DCNR and embraced by Heritage Areas. This overlap of focus offers significant continued opportunities for growing the partnership between DCNR and Heritage Areas as well as other partnership organizations.

Education and Interpretation: Telling a story more actively engages an audience. Stories are universal and bridge gaps in culture, age and even language. Story telling is used to teach ethics, values, cultural norms and differences and has historically been a tool to pass on generational knowledge and information. Information is more easily retained and often more quickly understood when told as a story and Heritage Areas offer multiple opportunities to explain history in the form of story. The very reason for the development of the Heritage Areas was to increase awareness of our region's history and way of life and, by doing so, engage others in conservation and preservation. Collateral material, explanatory and visual signage, interpretation, educational workshops, seminar, public communication and media are all mechanisms Heritage Areas use to share the stories of our region's past and impart the sense of urgency and need to sustain and conserve for future generations.

HeritagePA

HeritagePA is the statewide representative association for the 12 Pennsylvania Heritage Areas. The nonprofit association is represented by the leadership of all designated Heritage Areas and was developed for the purpose of offering a broader voice for the Program. It functions as a resource network, sharing best practices and addressing common challenges to expand the reach and influence of the Heritage Areas. There are four officer positions as well as a part time coordinator.

Officers (as of June, 2015):
President: Jane Sheffield, Executive Director of the Allegheny Ridge Corporation and representing the Allegheny Ridge Heritage Area

Vice President: Mark Platts, President, Susquehanna Heritage

Treasurer: Donna Holdorf, Executive Director of the National Road Heritage Corridor

Secretary: Marilyn Black, Vice President for Heritage Development of the Oil Region Alliance of Business, Industry and Tourism

HeritagePA Coordinator is Alan Chace, one of the key developers of the original Heritage Areas Program.

HeritagePA communications efforts include a web site for news and events and descriptions of the statewide Heritage Areas efforts and successes. HeritagePA also has led the design, and distribution of *Best Practices of HeritagePA*. The Association advocates for the re-authorization and funding for Heritage Areas (Parks) Program legislation.

The Heritage Areas Program and the 12 Heritage Areas have faced funding challenges over the past decade as the legislative budget line item under DCNR has decreased. The challenge became a crisis when the line item was completely removed from the 2009/2010 budget. With operational funding no longer available for many of the state-designated Heritage Areas, DCNR staff and Heritage Area Managers needed to find operational and program funding to continue the program.

The Heritage Areas, through HeritagePA, began a full court press to educate the legislative body of the value and importance of the Heritage Areas. Key to this legislative outreach has been the Growing Greener Coalition, an advocacy initiative funded largely by private foundations.

Originally launched to advocate for the establishment of a Growing Greener III fund, the Coalition brought great skills and solid legislative relationships to the table in the fight to restore heritage areas funding.

Efforts by HeritagePA and its Growing Greener Coalition partner resulted in restoration of the funding in fiscal year 2014 to a level that offered short term sustainability. It is clear, however, that a more stable source of funding must be found if the Program is to continue and to grow.

Today, there is a single source of administrative funding through DCNR's grant programs.   Heritage Area Managers and partners including DCNR have explored alternative sources of funding for several years. The goal is to secure a sustained and dedicated source of funding to cover administrative costs, allowing Heritage Area staff to fully direct their efforts for project funding and implementation of regional programs. Private foundations and other sources of funding typically do not cover administration costs, and Heritage Areas are thus dependent on DCNR's competitive grant program for this support.

In June of 2014, House Bill 2177 supporting the Heritage Area program was passed by the General Assembly. Its intent was to establish the Program under the DCNR. Although HB 2177 passed the House, it died when it did not move through the Pennsylvania Senate.

The process is now starting again led by the Growing Greener Coalition with strong support from Heritage Areas management entities who are in regular contact with regional legislators urging their support. Past efforts have borne fruit as funding was re-instated in the amount of $2.5 million for fiscal year 2014 as a line item. Dedicated legislatively mandated funding is essential to the Heritage Areas' viability and this strategic plan offers recommendations for addressing this key challenge.

Appendix II. Strategic Planning Research

Given the long history of Pennsylvania's Heritage Areas, much planning and historical documentation has already been developed. The team reviewed prior strategic efforts and histories of the program including the following documents, reports and studies:

- History of the PA. Heritage Areas, Eleanor Mahoney, 2014
- Economic Impact of PA's Heritage Areas, 2008
- PA Heritage Areas Program Appropriations History, DCNR, 2015
- The Economic Impact of National Heritage Areas, Tripp Umbach, 2015
- 2009 DCNR Heritage Areas Program Manual
- A Guide for Becoming a Heritage Destination, Schuylkill River National and State Heritage Area
- Overview of the Origin of the PA. Heritage Parks Program, Allen Sachse
- The Conservation and Natural Resources Advisory Council's Review and Recommendation PA, Heritage Areas Program, 2009
- Heart of the Civil War Heritage Area Conflict of Interest Statement
- Maryland Heritage Area Authority by-laws and statutes, 2013
- Maryland Heritage Areas Strategic Plan, 2014
- Cultural Heritage Tourism News (multiple issues, 2015)
- Living Landscape Observer (multiple issues, 2015)
- Lumber Heritage Region newsletters (multiple issues)
- National Road Heritage Corridor Marketing and Management Action Plan
- Rivers of Steel Heritage Corporation; multiple studies including Roots to Routes, Journeys, Management Action Plan
- Oil Region, Allegheny Ridge, Lincoln Highway: marketing material, work plans
- Web sites of all Heritage Areas
- Alliance of National Heritage Areas, Heritage Areas: Background, Proposals, and Current Issues, 2009
- West PA Magazine, (multiple issues, 2014, 2015)
- Best Practices of HeritagePA, 2013

Appendix III. Key Findings from Surveys and Interviews

Stakeholder Input

Three dozen stakeholders were interviewed by phone, in person or completed a written survey. These stakeholders provided background, historical references, opinions, reactions and edits throughout the process. The comments and feedback received are synthesized and reflected in key findings. Participants were assured of anonymity in order to obtain frank responses. Site visits to several Heritage Areas for in person interviews supplemented the process.

Heritage Area Managers Interviewed

Terri Dennison, PA Route 6 Heritage Corridor
Olga Herbert, Lincoln Highway Heritage Corridor, site visit
Donna Holdorf, National Road Heritage Corridor, site visit
Jane Sheffield, Director, Allegheny Ridge Heritage Area, site visit
Mark Platts, Susquehanna Heritage
Kurt Zwikl, Schuylkill River National and State Heritage Area
August Carlino, Rivers of Steel National Heritage Area, site visit
Natalie Gelb, Director, Lackawanna Heritage Valley National and State Heritage Area
Mike Wennin, Lumber Heritage Region
Marilyn Black, Oil Region National Heritage Area, site visit
Elissa Garofalo, Delaware & Lehigh National Heritage Corridor, site visit

DCNR staff interviewed

Lauren Imgrund, Director, Bureau of Recreation & Conservation
Diane Kripas, Division Chief, Recreation & Conservation Partnerships Division
Mike Piaskowski, Section Chief Recreation & Conservation Landscapes and Educational Services
Kathy Frankel, Manager, Recreation & Conservation
Meredith Hill, Director of the PA Wilds Initiative

Steering Committee

Consultants relied on three key members of the Steering Committee - Michael Piaskowski, DCNR; Jane Sheffield, Director Allegheny Ridge Corporation and Donna Holdorf, Director, National Road Heritage Corridor - for extensive and frequent feedback throughout the process including monthly progress reports.   These three acted as conduits of information throughout the process and assisted in developing survey and interviews, convening meetings and reviewing draft material.

Survey

A survey was developed for an abbreviated SWOT (Strengths, Weaknesses, Opportunities and Challenges) analysis.   The surveys were distributed to DCNR staff members who interact with the Heritage Areas Program, to Heritage Area managers, and to the HeritagePA Steering Committee.   A total of 30 surveys were distributed and 17 responded as noted below.

Heritage Area Managers: 9
DCNR staff: 7
HeritagePA: 1

Affinity Partners Interviewed

Larry Williamson, former Director, Bureau of Conservation & Recreation, DCNR
Alan Chace, HeritagePA
Brad Clemenson, Pennsylvania Environmental Council
Arthur Ziegler, Pittsburgh History & Landmarks Foundation
Richard Burkert, Johnstown Area Heritage Association
Andrew Heath, Growing Greener Coalition
William Callahan, PA Historical and Museum Commission

Research, Evaluation Models

Maryland Heritage Area Authority: Richard Hughes, Authority director; Jennifer Ruffner, Authority assistant director
Elizabeth Shatto, Heart of the Civil War Heritage Area
Lois Turco, Two Rivers Heritage Area (West Virginia)

Terry Maxwell, Maryland Byways
Jeff Buchheit, Baltimore Heritage Area
Donn Briggs, Capitol Region, Potomac Heritage National Scenic Trail
Jonathon Johnson, Center for Rural PA
George Stark, development consultant

Meetings and Presentations

January 22, 2015: HeritagePA Steering Committee, Harrisburg
February 12, 2015: Heritage Area Managers Meeting, Harrisburg
March 25, 2015: Plan Draft Review, Altoona
May 6, 2015: HeritagePA, Harrisburg
Notes were taken at each of these meetings.

Conference Calls

Monthly Progress Reports: Mike Piaskowski, Donna Holdorf, Jane Sheffield
December 14, 2014: Donna Holdorf and Jane Sheffield
July, 2015: Mike Piaskowski, Donna Holdorf, Jane Sheffield

Written comments

Olga Herbert, Marilyn Black, Augie Carlino, Elissa Garofalo

Follow up Conversations

 Augie Carlino, Olga Herbert, Donna Holdorf, Jane Sheffield, Mike Piaskowski, Marilyn Black

Survey

As an important aspect of the strategic planning process, the consultant team with the HeritagePA Steering Committee, developed a short survey to determine core issues of concern from the standpoint of DCNR as the administrative agency for the Heritage Areas Program as well as Heritage Areas Managers.   The survey was distributed to all 12 Heritage Area Managers and to DCNR staff associated in some capacity with the administration of the Program.

The last question was eliminated from surveys distributed to DCNR staff.

- What are the top three concepts or operations or issues you hope to see addressed in the strategic plan?

- What do you feel are the top three challenges facing the Heritage Areas?

- One aspect of this plan is to develop a process or tool to assess success for projects and programs. In your view, how do you define success? What impact measures are you most concerned with?

- Who is the most important audience for understanding the value of the Heritage Areas Program?

- HeritagePA is "the association through which the Commonwealth's heritage areas share best practices and leverage resources" and serves as "the collective voice that speaks to the importance of heritage areas…." Can or should the organization do more?

- How can HeritagePA as an organization better serve the work of the Heritage Area Managers?

- In your opinion, do any current DCNR policies or practices hinder the effective implementation of the Heritage Areas Program? If so, which policy or practice? How would you recommend it be addressed or adjusted?

Nine Heritage Area managers, the HeritagePA Coordinator and seven DCNR staff completed the survey. Responses offering similar comments are blended in this synopsis.

What are the top three concepts or operations or issues you hope to see addressed in the strategic plan?

Heritage Area Managers responses

- Fluid with action steps, raise awareness
- Clearly articulate value
- Address statewide recognition of value; legislative awareness of work; acceptance in the tourism industry
- Identify the challenges of close partnerships with other initiatives and look at the benefits of a stand-alone program.
- Ensuring consistent funding, 100% participation in HeritagePA
- DCNR on board as partner in ensuring long term funding; DCNR more accessible
- How to measure and thus value the intangibles of Heritage Area work

DCNR responses

- Stronger partnerships among Heritage Areas
- A Five Year plan for growth, direction similar to what has been developed for outdoor recreation and trails
- Is the industrial heritage theme still relevant to visitors; how to measure that?
- Defining DCNR role in the Program; more support or less
- Addressing the changing direction (management action plan updates: when, how often, who pays?)
- Evaluating value
- 3-5 year work plan updated with public participation; added capacity at board level; professional management procedures
- More clearly defined planning on engaging grassroots; clarify roles of DCNR and Heritage Areas managers; agreed upon goals and actions
- Effective partnership with tourism promotion agencies; working with other state agencies
- Sustaining; diversified funding; effective partnerships; clarity of function; value and uniqueness from other programs
- Define difference with other programs (eliminate overlaps); better define applicable projects for funding; measure success; ROI in costs and time; measuring capacity growth (intangible?) a key component and defined value of the Program.

The top three issues mentioned:
- Secured and dedicated consistent funding
- Defining value and success
- Stronger partnerships (Tourism Promotion Agency, DCNR, other state agencies) and overlapping other program interests

What do you feel are the top three challenges facing the Heritage Areas?

- Funding
- Measuring value
- Overlap; working better with other large landscape initiatives
- Valued as DCNR's top partner
- Current grant application restrictions
- Need for stronger Heritage Area boards
- Outdated management plans
- Competent management
- Need goals and outcomes clearly

Top Two Challenges:

- Secured, dedicated, consistent funding
- Measuring and communicating value

One aspect of this plan is to develop a process or tool to assess success for projects and programs. In your view, how do you define success? What impact measures are you most concerned with?

- One size does not fit all
- Annual progress reports measure successes
- Jobs, matched funds
- Solves a documented need; economic impact, increased visitor spending
- Completion of projects

- Sustained partnerships
- Funded at state level and driven by local constituencies
- Recognized by multiple state agencies as established and respected regional facilitators protecting, conserving known regional assets.
- Awareness
- People participating at events
- Numbers visiting sites; economic impact
- Changing attitudes on heritage, cultural and environmental resources
- Annual work plan approved by DCNR with clearly measurable actions, impact measures, including increased visitation, ability to advance signature projects
- Secured funding as recognition of value and good work i.e. success.
- # of partnerships; private funds leveraged; tourism visitation; technical assistance contracts

Who is the most important audience for understanding the value of the Heritage Areas Program?

- Legislators
- DCNR
- Public (community, businesses, visitors, private funders)
- Tourism

HeritagePA is "the association through which the Commonwealth's Heritage Areas share best practices and leverage resources" and serves as "the collective voice that speaks to the importance of heritage areas…." Can or should the organization do more? How can HeritagePA as an organization better serve the work of the Heritage Area Managers?

- Voice with legislators, speak to the importance of heritage tourism,
- Staff and board training
- Needs broader involvement from all heritage areas
- A full time position is needed
- The lack of much response could be interpreted as lack of engagement with the association

In your opinion, do any current DCNR policies or practices hinder the effective implementation of the Heritage Areas Program? If so, which policy or practice? How would you recommend it be addressed or adjusted?

- Keystone funding pool changed to allow for nonprofits
- Need more involvement from regional staff
- Too many overlapping programs
- No mention of Heritage Areas on signage, tag lines, etc.

In addition to surveys, 11 Heritage Areas managers were interviewed either by phone or in person as well as four DCNR staff. (Note: The Heritage Area manager for Endless Mountains resigned during the planning and was unable to be interviewed).
Although most of the in person interviews confirmed the responses on the written survey, there was deeper discussion and background offered on work to date regarding funding and internal challenges.

Other comments regarding evaluating success:

- Check out what each Heritage Area is providing to their boards now in reports
- NPS model required compliance by those federally designated.
- More field trips for regional liaison staff
- More greenway/landscape summits offering a greater exchange of information

Throughout the planning process, stakeholders were asked their vision for where the Heritage Areas Program will be in five years:

- Legislated, dedicated source of funding
- DCNR and Heritage Areas are strong partners and speak as one voice on issues in common
- Tourism is integrated fully in Heritage Area marketing
- Heritage Areas are the "go to" for community development
- Heritage Areas work smarter, work better

Appendix IV. Evaluation Metrics

The Evaluation Component of the Plan is included as a record of the research and work completed during the planning process. Following discussion, it was determined that the evaluation piece would not be implemented at this time but the information would be included as a reference for future discussion.

Accurately assessing the value and performance of Heritage Areas and the impact of their completed projects would inform legislative and public outreach, justify sustaining the Program and, through a greater understanding of the quantifiable value of Heritage Areas, strengthen the ability of DCNR to support and grow the Heritage Areas Program.

Making the case for evaluating performance should include frequent discussions among the parties - those doing the evaluating and those being evaluated- to ensure equitable and achievable benchmarks, clearly understood from the onset. Also built into the process should be regular re-assessments of the benchmarks for any necessary recalibration.

The Evaluation Component of the Plan addresses two areas:
 1. Management Performance
 2. Project Impacts

Management Performance is meant to encourage each Heritage Area to reach and establish a measurable level of quality which can be used by DCNR to garner support and defend future investments in the Heritage Areas Program.

The recent update to the DCNR Partnership Grant application requires detailed descriptions of projects including outcomes, thus Heritage Area Managers are now recording project impacts (outcomes) through the application process and reporting on percentages completed during progress and closeout reports.   The projects delineated in the application should relate to the Heritage Area's Three Year Work Plan. This will bring Partnership grant requests directly in line with articulated Heritage Area goals. Following a few years of grant closeout reporting, DCNR should be able to easily compare outputs and outcomes from the closeouts to the Heritage Area Three Year Plan and determine performance levels and percentages of successfully completed projects with defined and quantifiable outcomes.

Management Performance
Evaluates each Heritage Areas in three categories on an annual basis:
  • Activities Completed
  • Matching Funds
  • Operational Excellence

Heritage Area Managers would provide information in the three categories. Responses to the questions in each category would be awarded points, which would be measured against benchmarks (described below). The benchmark scores would be totaled for each of the three categories and the Heritage Area awarded an overall score to determine if they:
- Exceed the Benchmark
- Meet the Benchmark
- Need Improvement

A pilot evaluation period is recommended to ensure the categories measured accurately reflect level of performance and the information reported can be fairly and equitably gathered. Each Heritage Area would complete a form and submit to DCNR as part of grant closeout requirements.

Activities Completed would measure: Percentage of activities completed each year based on Partnership grant applications and three year work plans.

Matching Funds would measure:
- Ratio of Non-DCNR funds to DCNR funds
- Diversity of Funding Sources

Operational Excellence would measure:
- Timely submission of DCNR reports
- Grant Completion Rates
- Operational Standards

Activities Completed

This category would measure the percentage of planned activities completed as outlined in the DCNR Partnership Program application for the year following the grant award. A final closeout report to DCNR would be used to determine whether the Heritage Area has met, exceeded or failed to meet the benchmarks.

There should be an opportunity on the evaluation form to provide details on projects that are not completed, have changed or were cancelled. If adequate information is provided, these activities would not be counted in determining the percentages of projects completed. For example: if there is a project that was proceeding more slowly than its original schedule, details would be provided if a good faith effort had been made to complete the activity and the work is proceeding on a revised schedule. If a project was cancelled due to circumstances beyond the control of the Heritage Area, this would also be noted on the form.

Matching Funds

This category is measured using two metrics:
    Metric 1: Ratio of matched funds to DCNR grants
    Metric 2: Diversity of matched funding sources

Metric 1: Ratio of matched funds to DCNR Grants

0 points	No matching funds
1 point	Less than a 1 to 1 match
2 points	1 to 1 match
3 points	Greater than a 1 to 1 match

Metric 2: Diversity of matched funding sources

0 points	No matching funds
1 point	Matching funds from 1-2 Sources
2 points	Matching funds from 3-5 Sources
3 points	Matching funds from 6 or more Sources

Combining points received from Metric 1 and Metric 2 would determine the total point value in the **Matching Funds** category. Using the following chart would determine an overall score for this category.

FINAL EVALUATION FOR THIS CATEGORY IS DETERMINED AS FOLLOWS:	
2 points or less	Requires Improvement
3-4 points	Meets the Benchmark
5 or more points	Exceeds the Benchmark

Operational Excellence

This category would be measured using three metrics:
  Metric 1: Timely Submission of DCNR Reports
  Metric 2: Grant Completion and Closeout Report Rates
  Metric 3: Operational Standards

Metric 1: Timely Submission of DCNR Reports

0 points	Less than 75% of submissions on time
1 point	75% or more submissions on time

Metric 2: Grant Completion and Closeout Report Rates

A grant fails to be in good standing if the grant is expired and a request for extension was not made prior to the grant agreement end date.

0 points	Less than 75% of grants are in good standing
1 point	75% or more of grants are in good standing

Metric 3: Operational Standards

This metric includes:
- This metric would measure board operational practices using the Pennsylvania Nonprofit Organization's (PANO) Standards of Excellence as the standard.
- Annual Board Review of Operations

0 points	There is no board manual, no board review of operations
1 point	A board manual exists
1 point	A board review is conducted at least every two years
2 points	A board manual exists to PANO Standards
3 points	A board manual exists and board and management adhere to it, updating it regularly

Combining points from all metrics would determine total point value for **Operational Excellence** category.

FINAL EVALUATION FOR THIS CATEGORY WOULD BE DETERMINED AS FOLLOWS

0 - 2 points	Requires Improvement
3-4 points	Meets the Benchmark
5 points	Exceeds the Benchmark

Use the chart below to determine your Overall Management Performance.

DETERMINED BY SUMMARIZING FINAL EVALUATIONS FOR EACH OF THE THREE CATEGORIES:	
2 or more "Requires Improvement"	Requires Improvement
2 or more "Meets the Benchmark" or 1 "Requires Improvement" and 2 "Meet or Exceeds the Benchmark	Meets the Benchmark
3 "Exceeds the Benchmark" or 1 "Meets the Benchmark and 2 "Exceeds the Benchmark"	Exceeds the Benchmark

If a Heritage Area receives 2 or more "Requires Improvement" the following steps will occur:

Year 1: DCNR staff would notify the Heritage Area Manager of identified deficiencies and meet with the manager to discuss steps to rectify the situation by the close of the next evaluation (next fiscal year).

Year 2: If the evaluation does not improve, DCNR would notify the Heritage Area Manager and board chair and detail the identified deficiencies. The Heritage Area manager would be required to submit a written plan to rectify and correct the deficiencies. DCNR staff would provide technical assistance in preparing this plan. At this point, grant funding might be cut by 25%

 Year 3: If the evaluation still did not improve, a Review Panel would be convened (consisting of DCNR staff, the Heritage Area manager, and members of the board). This panel would work to develop a remediation plan to rectify the deficiencies. DCNR might also cut funding by an additional 25%

Year 4: If the evaluation still showed no improvement, the Review Panel could recommend decertification of the Heritage Area.

Project Impact Measures

This data collection approach uses the National Park Service model. Accordingly, information requested would already have been documented by the federally-designated Heritage Areas.   It is hoped that much of the information would also be similarly documented by state Heritage Areas through DCNR progress reports or board reports.

The objective of this data collection would be to collect and synthesize tangible examples of value and success of the Program to make the case for sustained funding and support from local, regional and state entities.

Information on completed projects would be gathered in five categories based on the current areas of focus for Heritage Areas:

Economic Development
Partnerships
Cultural Conservation
Recreation/Open Space
Education/Interpretation

Data would be reported from the previous calendar year. This includes on-going activities such as technical assistance. For activities spanning multiple years such as trail building; building restoration; design guideline studies; etc., data would be reported on the aspects or percentage of these projects completed in the previous calendar year.

Economic Development
Data should be reported on the following activities helping to spur economic development and tourism opportunities in the communities within the Heritage Areas.

- Number and dollar amount of historic preservation grants awarded within the Heritage Area.

- Number of historic preservation projects begun or continued including nominations for historical status.

- Number of sites maintained and the total acreage of preserved landscapes.

- Community development projects completed (examples include streetscape or façade restoration projects, art, business development).

- All specific outcomes including short project description, partners, etc.

Partnerships

A partnership is a relationship between parties to accomplish a common goal, such as developing or implementing heritage as a project or offering Heritage Area programs.

- Number of formal partners engaged during the previous calendar year through written agreements such as a MOU or MOA.
- Number of informal partners engaged.
- Number of volunteers engaged, including hours engaged and actions used to engage them.
- Event and program participation including the number

Cultural Conservation

The primary purpose will be to document cultural traditions or the conservation of artifacts.

- Number and dollar amount of collections-related grants awarded within the year
- Number of projects begun or continued for the purpose of conserving Heritage Area artifacts (examples include: conditions assessments, plans, research)
- Number of projects completed which were led or funded by Heritage Areas or in which the Heritage Area played a significant role. These projects should be related to collections created, documented or conserved. Collections include oral histories, paintings, murals, historic documents, textiles, or archaeology collections.

Recreation/Open Space

This category would focus on conserving and enhancing the development and protection of natural and recreational resources in the Heritage Areas.

- Number and dollar amount of recreation development grants awarded by Heritage Area.
- Number of projects begun or continued to enhance recreational amenities (feasibility studies, plans, permitting, engineering, construction and upgrades). The same project could be reported over multiple years.
- Trails Completed: On–road miles; Off–road miles

- Number of trails maintained through monitoring, clean ups, maintenance projects: On–road miles; Off–road miles
- Name and short description of other trail or park enhancement projects such as parking, signage, lighting, etc. or trail designation projects (identify mileage)
- Outcomes realized through recreation work, including grants, including project name, year project completed, and partners.

Education/Interpretation
This focus area of Heritage Areas communicates the significance of the region's resources and stories to residents and visitors.

Reporting on this category would include encouraging and supporting curriculums, workshops, and conferences focusing attention on the region and its assets.

- Number and dollar amount of education and interpretation related grants awarded within the reporting year.
- Number of education and interpretation projects in development (assessments, research) the same project could be reported on over multiple years, until it was made available to the public.
- Outcomes resulting from Heritage Area educational work, including grants would be reported and include the project name, year project completed, project partners and indicator and data source for outcome.
- Number and dollar amount of promotion and marketing grants awarded within the reporting year.
- Number of promotion and marketing projects in development.
- Events offered and supported by the Heritage Area, including celebrations, award ceremonies, FAM tours.
- Products developed or supported by Heritage Area, including brochures, economic impact studies, web sites.
- Outcomes resulting from Heritage Area marketing activities, including name, year started and completed, and partners.

The following is a page from a **sample form** to be used to the collect recommended information in the Cultural Conservation category.

This could be duplicated for the other Project Impact Performance Measures should the Evaluation Metrics be initiated in the future.

CULTURAL CONSERVATION Number of collections related grants awarded this year			
# of Grants	Dollar Amount	Description	
Number of projects begun or continued to conserve heritage area artifacts (conditions, assessments, plans, research)			
# of projects begun	# of projects continuing /% completed	Type of project	
Number of projects completed (heritage area led, funded or partnered with other parties			
# of projects completed	# Heritage Led	# Heritage funded	# partner with others/ name partner
Collections created, documented or conserved (collections include oral histories, paintings, murals, historic documents, textiles, archaeology collections or materials cultures such as boats or ships)			
# and type of collections created	# and type of collections documented	# and type of collections conserved	
Report on outcomes that resulted from your collections related work including grants. Short description with project name, year project completed, partners			
Project name	Year Project Completed	Partners	Outcomes

Appendix V. Heritage is Now Communications Calendar

HERITAGE PA
STATEWIDE COMMUNICATIONS SCHEDULE thru 2019
Working Calendar | UPDATED 11/16/15

ACTIVITY	LEAD / PARTNERS	2015			
		Q1 2015	**Q2 2015**	**Q3 2015**	**Q4 2015**
BRANDING & TOOLS	HeritagePA	Strategic Planning	Complete and distribute "Heritage is Now" identity ("stamp") Register MadMimi email account and HeritagePA Facebook and Twitter accounts	Complete and distribute "Heritage is Now" identity ("stamp") and toolkit to Heritage Areas, DCNR, and relevant partners	
MONTHLY NEWSLETTER	HeritagePA / Heritage Areas, DCNR, and regional tourism organizations	Strategic Planning		Monthly release via HeritagePA database and posting to HeritagePA.com, Heritage Areas websites, and DCNR Heritage Areas page	
SOCIAL MEDIA	HeritagePA / Heritage Areas, DCNR, and regional tourism organization**s**	Strategic Planning	Design and Release first edition of "Heritage is Now" newsletter to <u>ALL</u> available lists during Tourism Week 2015 (5/2-10) Invite to continue to receiving monthly editions from Heritage PA directly to inbox	Weekly Facebook and Twitter posts using newsletter content sections: *Happening Now / Be Here Now / Now & Beyond / Now You Know* Tag relevant Heritage Areas, feature organizations/people, and DCNR on weekly basis Deploy $50 - $100 "Boost" Posts or promotions for major statewide announcements and during Tourism Week	
WEBSITE HeritagePA.com	HeritagePA / Heritage Areas	Strategic Planning	WordPress upgrades Design upgrades Analytics integration Add "Resources" Page for featuring documents & information legislators and policymakers	Monthly updates: News Events Resources Attractions	
PARTNER and PRESS OUTREACH	HeritagePA / Heritage Areas and DCNR	Strategic Planning		"Heritage is Now" virtual briefing w/ DCNR, DCED, and regional tourism groups Distribute summary via press advisory to Heritage Areas for press advisory	
MEASUREMENT & REPORTING	HeritagePA	Strategic Planning		Complete quarterly summary of website visits, social media enagement, partnership activity, and press coverage Distribute to Heritage Areas, DCNR, and relevant audiences	
INTERNAL COMMUNICATION	Heritage PA / Heritage Areas	Strategic Planning		Establish Google collaboration tools among Heritage Area managers	Ongoing information-sharing among Managers

HERITAGE PA
STATEWIDE COMMUNICATIONS SCHEDULE thru 2019
Working Calendar | UPDATED 11/16/15

ACTIVITY	LEAD / PARTNERS	2016 - 2019			
		Q1 2016 - 2019	Q2 2016 - 2019	Q3 2016 - 2019	Q4 2016 - 2019
BRANDING & TOOLS	HeritagePA	Complete and distribute update of toolkit with previous year highlights and suggestions for outreach to Heritage Areas and partners			
MONTHLY NEWSLETTER	HeritagePA / Heritage Areas, DCNR, and regional tourism organizations	Monthly release via HeritagePA database and posting to HeritagePA.com, Heritage Areas websites, and DCNR Heritage Areas page			
SOCIAL MEDIA	HeritagePA / Heritage Areas, DCNR, and regional tourism organization**s**	Weekly Facebook and Twitter posts using newsletter content sections: *Happening Now / Be Here Now / Now & Beyond / Now You Know* Tag relevant Heritage Areas, feature organizations/people, and DCNR on weekly basis Deploy $50 - $100 "Boost" Posts or promotions for major statewide announcements and during Tourism Week			
WEBSITE HeritagePA.com	HeritagePA / Heritage Areas	Monthly updates: News Events Resources			
PARTNER and PRESS OUTREACH	HeritagePA / Heritage Areas and DCNR	"Heritage is Now" bi-annual virtual briefing w/ DCNR, DCED, and regional tourism groups Distribute summary via press advisory to Heritage Areas for press advisory		"Heritage is Now" bi-annual virtual briefing w/ DCNR, DCED, and regional tourism groups Distribute summary via press advisory to Heritage Areas for press advisory	
MEASUREMENT & REPORTING	HeritagePA	Complete quarterly summary of website visits, social media enagement, partnership activity, and press coverage Distribute to Heritage Areas, DCNR, and relevant audiences			
INTERNAL COMMUNICATION	Heritage PA / Heritage Areas	Ongoing information-sharing (Google)			

The photography throughout this document was provided by the PA Heritage Areas. For more information on these heritage areas, www.heritagepa.com