



# Blue Ridge National Heritage Area Evaluation Findings



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## Executive Summary

### Purpose of this Report

This report was prepared on behalf of the National Park Service (NPS) as part of the evaluation of the Blue Ridge National Heritage Area (BRNHA). The specific goals of this report are to evaluate:

- 1) The accomplishments of the program since its establishment as a National Heritage Area (NHA) in 2004
- 2) The level of program investments and leverage provided by NPS funding
- 3) The sustainability of BRNHA as an ongoing force in the community

Currently there are 49 National Heritage Areas that have been authorized by the U.S. Congress. As each of these NHAs reaches the end of its authorization period, NPS conducts an evaluation of the program and reports the results to Congress.

To ensure unbiased evaluations, NPS contracts with an independent evaluation firm to conduct the evaluation and prepare the evaluation report. This independently produced report was prepared by ARCBridge Consulting & Training Inc. and serves to document the methodology used and the findings that have emerged from analysis.

The Congressional legislation authorizing BRNHA (Public Law 108-108, November 10, 2003) pointed to several distinctive legacies within this region which served as the basis for the authorization. These included:

- The Blue Ridge Mountains form one of the longest and oldest mountain chains in the world
- Historic sites and artifacts from Cherokee Indian culture dating back thousands of years
- BRNHA is the origin of the traditional craft movement starting in 1900, and the contemporary craft movement in the 1940's with the third largest concentration of craftspeople in the U.S.
- Traditional musical heritage including string band music, bluegrass, ballad singing and sacred music
- Cherokee agricultural heritage, including medicinal and ceremonial food crops combined with historic European patterns of raising livestock

### Key Evaluation Questions

#### Question 1:

**Based on its authorizing legislation and general management plan, has BRNHA achieved its proposed accomplishments?**

#### Question 2:

**What have been the impacts of investments made by Federal, State, Tribal and local government and private entities in the Blue Ridge area?**

#### Question 3:

**How does the Blue Ridge National Heritage Area's management structure, partnership relationships, and current funding contribute to its sustainability?**

### Evaluation Methodology

In order to address these questions, the ARCBridge team followed a structured evaluation methodology that had previously been used in the evaluation of other NHAs. This methodology involves a three-phased process which includes:

- 1) Tailoring the evaluation design specifically to the Blue Ridge National Heritage Area
- 2) Gathering and performing an initial review of results
- 3) Analyzing the data and documenting findings

**The process of tailoring the evaluation required early coordination with BRNHA staff to assemble and review more than 150 foundational documents.** Such documents consisted of the enabling legislation and planning documents (e.g., management, strategic, and marketing plans). The gathering of these documents began in conjunction with the planning of a Meet and Greet site session in Asheville N.C. at the beginning of the project. Subsequent conference calls, a second longer site visit, and follow-up discussions took place over the course of the ensuing months.

During the initial Meet and Greet session, the ARCBridge team met with BRNHA staff and members of the board of directors. ARCBridge then visited several sites and communities in Western North Carolina that showcased BRNHA activities and community impact.

The Meet and Greet session was also an occasion where the ARCBridge team held discussions with BRNHA staff to identify program inputs, program participants, and various types of program outputs/impacts that would create the foundation of the BRNHA logic model, which is detailed in Section 3.

This early project work was followed by a second site visit to carry out further data collection and interviews around the Heritage Area. The interviews focused on talking to:

- BRNHA partners (including arts councils, foundations, and tourism organizations)
- BRNHA Board Members
- Individuals managing operations at different program locations (e.g. schools, museums, exhibits, grant recipients)
- Consultants who have worked with BRNHA
- Community members at various sites

The analysis of this material also included financial records, partnership records, and grants management records. Thus, a portion of the analysis was financial in nature, while other analysis was derived through qualitative observations.

*Question 1. Based on its authorizing legislation and general management plan, has the Blue Ridge National Heritage Area achieved its proposed accomplishments?*

Congressional legislation specified that BRNHA was to preserve and interpret the cultural and historical resources of the Blue Ridge area which comprises of 25 counties in Western North Carolina. These resources encompass five heritage themes: traditional music, craft traditions, Cherokee culture, an agricultural heritage focused on raising livestock and specialty crops, and the natural heritage and beauty surrounding the Blue Ridge Parkway and the Smoky Mountains.

Furthermore, the purpose of authorizing BRNHA was to foster a close working relationship between all levels of government, the private sector, and local communities.

Table E.1 (on the next page) outlines the overall scope of the BRNHA mission and activities based upon the legislation and the BRNHA Management Plan that address the first evaluation question above.

## Development of Music Heritage

**One of the most significant programs in BRNHA's portfolio is its investment in music heritage. The focus of this program has been on preserving the music traditions of the region, educating new generations regarding this traditional music, and developing a new heritage tourism product to promote economic improvement in the area.**

**BRNHA has also supported music heritage through 56 grants since 2005. This \$507,086 investment constitutes 24% of the federal funding that was spent on grant giving.** These grants aided the following initiatives:

- Preserving and restoring historic music halls
- Creating new music venues in smaller communities using existing structures and buildings (e.g., churches, schools)
- Compiling a Traditional Artist Directory of 400+ artists
- Supporting the signature Blue Ridge Music Trails program and website by fostering partnerships with more than 100 local music venues and artists
- Educating youth in school programs and social studies curricula focusing on traditional music
- Funding a documentary film on a master fiddler in Madison County

## Investment in Craft Heritage

**Home to the traditional and contemporary movements, BRNHA has developed partnerships with the region's most historic crafting institutions as well as the local artisan community that will soon culminate in BRNHA's 2nd signature product - a new digital Craft Trail. BRNHA has also supported craft heritage through 41 grants since 2005. This \$448,375 investment accounts for 21% of the total federal funds allotted to grants during this period.** These grants promoted various aspects of craft heritage including:

- Partnering with the North Carolina Department of Cultural Resources on a statewide program of workshops to teach rural arts and culture nonprofits to develop partnerships
- Funding for the Center for Craft, Creativity and Design
- Aiding the development of the Quilt Trails of Western North Carolina in several counties to paint quilt patterns on barns and selected buildings
- Partnering with the Southern Highland Craft Guild to present an exhibit at the Asheville Art Museum showcasing women in the Craft Revival Movement

Purposes Specified in Legislation	Goals Outlined in BRNHA Management Plan	BRNHA Activities
Preserve and interpret traditional musical instruments and vocal traditions	Sustain and increase awareness of Western North Carolina musical traditions and increase the income of music operations and musicians	Develop and invest in the Blue Ridge Music Trails, BRNHA's 1st signature product, revitalize historic music halls, and promote music education
Preserve and interpret the traditional and contemporary craft movement	Sustain and increase awareness of the region's craft traditions and increase the income of local artisans	Promote and educate local artisans, partner with historical craft institutions, and develop a new digital Craft Trail
Preserve and interpret Cherokee heritage in terms of sites, cultural traditions and artifacts	Preserve culturally important sites and artifacts for the Cherokee and increase income of Cherokee members	Invest resources in Cherokee heritage through partnerships, grants, educational exhibits, and special projects
Preserve and interpret the area's agricultural heritage of specialty crops and livestock	Maintain and increase awareness of the region's agricultural traditions	Develop and invest in agricultural grants and promote agricultural tourism and development
Preserve natural resources and increase awareness	Preserve and create awareness of natural resources and boost tourism	Promote natural heritage through grants that assist small communities with projects such as biking trails. Develop a Heritage Trail that connects 70 sites across BRNHA
Foster a close working relationship with all levels of government, the private sector and local communities in fulfilling this mission	Work together with Federal, state and local government and community groups to fulfill the mission	Develop marketing, branding and tourism support to bind diverse elements of the region together

**Table E.1: Legislation, Goals, and Activities**

- Marketing of the Graham County Barn Quilt Trail
- Providing resources for a series of business and marketing classes for local craft entrepreneurs
- Updating more than 100 partners about BRNHA activities twice a year through regional meetings

### Investment in Cherokee Heritage

BRNHA has evidenced significant interest in supporting the preservation and awareness of the Cherokee culture. The Cherokee population within the NHA is approximately 8,000 to 10,000 persons. One of the members of the BRNHA Board of Directors is from the Eastern Band of Cherokee Indians. BRNHA has allocated 25 grants since 2005. The \$218,506 investment reflects 10% of the total federal funds invested since 2005. The following illustrates a few of the Cherokee grants:

- Creation of a Cherokee homestead exhibit and winter house in Hayesville, N.C.

- Establishment of an exhibit and annual Cherokee Heritage Festival at Nelson Heritage Park
- Funding of a Traditional Artist Directory that includes Cherokee artisans
- Digital media showcasing Cherokee crafts and traditions by the Mountain Heritage Center at Western Carolina University
- A six month long exhibit featuring Appalachian, Cherokee, and Low country baskets at the Asheville Art Museum
- Support for the Qualla Arts and Crafts Museum in Cherokee, N.C.

### Preservation of Agricultural Heritage

BRNHA has a set of unique agricultural traditions reflected in historic farm sites as well as in working farms. To support preservation of this heritage, BRNHA has invested in 31 grants since 2005 totaling \$322,923. This represents 15% of the total federal funds earmarked for grants during the period.

Notable projects in this series have included:

- Funding of the Appalachian Sustainable Agricultural Project, which supports family farmers, expands farm tourism and created the Asheville City Farmers Market
- Sponsoring Annual Business of Farming conferences
- Providing grants to support renovations at the Johnson Farm in Henderson County
- Developing the Orchard at Altapass, a 100 year old apple orchard high in the Blue Ridge Mountains
- Awarding a grant to the Mitchell High School Working Farm Education Program to educate high school age students in local agribusiness trends and sustainable practices

### Development of Natural Heritage

**The Blue Ridge Mountains are among the oldest in the world. To support Natural Heritage programs, BRNHA has provided 42 grants since 2005 which in total amounted to \$526,489. This represents 25% of the federal monies earmarked for grants.**

Efforts supported by BRNHA have included the following:

- Supporting a documentary film about pioneering forestry educator Carl Schenck
- Developing a four county initiative to promote the Yadkin Valley as a destination for outdoor recreation, cultural heritage, and local cuisine
- Providing grants to the Muddy Sneakers program which focuses on science education in protected and biodiverse lands
- Creating signage at 70 nature sites on the Blue Ridge Heritage Trail

### Develop Overall Marketing, Branding, and Tourism Support for the Heritage Area

**As part of an effort to provide a cohesive marketing approach for highlighting the entire Blue Ridge National Heritage Area program, BRNHA focused its efforts on a regional branding initiative that focuses on boosting tourism.** As a result, BRNHA has received several Google marketing grants that have helped increase visits and views of the main BRNHA website. **This comprehensive strategy requires several daily tasks for BRNHA staffers in coordination with numerous partner organizations.**

These activities include:

- Purchasing advertising in North Carolina Travel Guides, Asheville Travel Guides, and Blue Ridge Parkway Association publications
- Developing cooperative marketing and advertising contracts with three regional host organizations— Blue Ridge Mountain Host, High Country Host, and Smoky Mountain Host
- Launching the “Proud to be Part of the Blue Ridge National Heritage Area” public relations campaign
- Developing the “Living Traditions” campaign to generate stories in regional and national publications
- Featuring news articles about BRNHA programs in USA Today, Asheville Citizen Times, Sylvia Herald, Cherokee Scout, Lonely Planet and WNC Magazine
- Developing and upgrading a comprehensive website: blueridgeheritage.com
- Developing a separate website for the Blue Ridge Music Trails program: blueridgemusicnc.com
- Conducting a series of Hospitality Training Workshops, in conjunction with Biltmore Company, to support partners in the tourism and museum communities and enhance the awareness of BRNHA cultural and heritage sites
- Partnering with the State of North Carolina, various local towns and counties in the region, and a variety of nonprofit organizations (e.g., Asheville Convention and Visitors Bureau, Southern Highland Craft Guild, and the Cherokee Preservation Foundation) and for-profit corporations (e.g., Biltmore Company)

**From the findings presented above, ARCBridge believes that BRNHA has taken a number of steps necessary to fulfill its mission as outlined in the authorizing legislation and program management plan.**

*Question 2. What have been the impacts of investments made by Federal, State, Tribal and local government, and private entities in BRNHA?*

To address this question, ARCBridge examined how federal and non-federal funds were spent to support NHA program initiatives. **This data indicates that BRNHA has exceeded its 50% match requirement by generating \$10.7 million in matching funds in exchange for a National Park Service/National Heritage Area contribution of \$8.7 million. This is a total matching ratio of .45.**

That is, the National Park Service provided 45% of the funds to support the program, below the target of 50%. Of the monies spent in support of BRNHA, 80.1% were focused on programs, while 19.9% were used for management and organizational operations.

BRNHA programming activities have varied substantially across its 13 year history. In order to understand how BRNHA allocated its funds across various programs and operational areas, expenditure data by activity for the last three fiscal years (FY2014-2016) was provided to ARCBridge as the best representation of current BRNHA programming.

Based upon this analysis, the estimated breakout appears as follows:

Activity	% of Expenditures
Management/Operations	20%
Sub-Grants	15%
Marketing	16%
Blue Ridge Music Trails	16%
Blue Ridge Heritage Trail	19%
Visitor Services & Group Tours	14%

**Table E.2: % Expenditure by Activity**

Because BRNHA provides staffing for the Blue Ridge Parkway Visitor Center (a National Park Service facility), a portion of their funds supports this NPS function.

**The impact of these investments have been significant and are discussed in detail in Sections 3 and 4.**

*Question 3. How does the Blue Ridge National Heritage Area’s management structure, partnership relationships, and current funding contribute to its sustainability?*

A key issue in this analysis revolves around the definition of “sustainability.” To guide this assessment, ARCBridge used the definition that was developed by NPS:

*“...the National Heritage Area coordinating entity’s continuing ability to work collaboratively and reciprocally with Federal, State, community, and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation and economic development of nationally significant resources.”*

Critical components of sustainability for a National Heritage Area include, but are not limited to:

- The coordinating entity and NPS honoring the legislative mandate of the NHA
- The coordinating entity’s management capacity including governance, adaptive management (such as strategic planning), staffing, and operations
- Financial planning and preparedness including the ongoing ability to leverage resources in support of the local network of partners
- Partnerships with diverse community stakeholders while serving as a hub, catalyst, and/or coordinating entity for ongoing capacity building, communication, and collaboration among local entities
- Program stewardship where the combined investment results in the improved economic value and long-term quality of life of that region
- Outreach and marketing to engage a full and diverse range of audiences

**ARCBridge’s analysis indicates that BRNHA has a number of key elements that contribute to the long-term sustainability of its financial position:**

- **BRNHA has a strong board of directors and staff that have demonstrated fundraising capability to fill in for gaps in financing from state and federal sources**

- The board of directors has been significantly involved in overall strategy and marketing
- The organization has developed a broad group of partners from a variety of communities and geographies within the National Heritage Area
- Over 1,100 individuals and organizations form a base of partners that offers the potential for numerous avenues for long-term fundraising support and volunteering
- BRNHA has retained a consultant to establish a new framework for fundraising (using funding from a foundation to pay for the consultant) focusing on grants, corporate giving, and individual philanthropy and endowments
- The BRNHA Marketing Committee has, since 2006, invested in outreach and marketing programs designed to enhance tourism and site visitation from within the region and the larger national market
- The marketing program has also included a focus on the branding of BRNHA to identify products and offerings that stimulate visitation

## Structure of this Report

Besides the Executive Summary and the Appendix, this report is organized into five sections as follows:

### 1. INTRODUCTION

**Section 1** delves deeper into the underlying purpose of this evaluation and the overall methodology used

### 2. OVERVIEW OF BRNHA

**Section 2** provides an overview and description of the Blue Ridge National Heritage Area including characteristics of the population, the area's history, current tourism, and agricultural conditions. This section also describes BRNHA's organizational structure, authorizing legislation, board membership, staffing, and its relationship with partners in the community

### 3. BRNHA FULFILLMENT OF AUTHORIZING LEGISLATION AND MANAGEMENT PLAN

**Section 3** elaborates upon BRNHA's goals and objectives as laid out in its management plan.

All of BRNHA's various programs and outcomes are described in detail, including its grant giving process, five themes of music, craft, Cherokee, agricultural, and natural heritage, the overall marketing and tourism strategy, BRNHA contributions to the Blue Ridge Parkway Visitor Center, and dozens of case studies and community profiles. Section 3 aims to show how these activities relate to the initial question in the evaluation—has BRNHA achieved its proposed accomplishments laid out in the authorizing legislation and management plan?

### 4. IMPACT OF PUBLIC/PRIVATE INVESTMENTS

**Section 4** analyzes BRNHA's finances within the context the second evaluation question, i.e., what are the impacts of Federal/non-Federal funds?

### 5. BRNHA SUSTAINABILITY

**Section 5** explores the third and final question in the evaluation—how does BRNHA's management structure, current funding and partnerships contribute to the program's sustainability?

### APPENDIX:

The appendix of this report includes the evaluation legislation, authorizing legislation, NPS evaluation methodology guidelines tailored by ARCBridge for BRNHA specifications, Community Intercept Survey, and Domain Matrices.



## Section 1 - Introduction

### 1.1 National Heritage Areas

National Heritage Areas (NHAs) are sites that have been established by the U.S. Congress to stimulate historic preservation, interpretation, and economic development of specific areas of the country. These areas represent blends of natural, cultural, or historic resources and are aimed at highlighting unique elements of history and development within the United States. In 1984, Congress designated the Illinois and Michigan Canal as the first National Heritage Area. Currently 49 NHAs have been authorized by Congressional legislation.

NHAs can be managed by states, local governments, non-profit institutions, or universities. The National Park Service (NPS) within the Department of the Interior provides advisory services and annual financial support. The funding comes from Congress, via NPS (between \$150,000 and \$710,000 per area, or \$18.8 million for all areas). Congress controls what regions are given the designation of National Heritage Areas as it must pass legislation to authorize a specific NHA designation.

As directed in the authorizing legislation, each NHA writes a management plan which is then approved by the Secretary of Interior. This plan describes the objectives set forth by the local program management organization or coordinating entity. The objectives are specified in the enabling Congressional legislation which outlines the specific goals of each National Heritage Area. The coordinating entity generally creates an Advisory Board of Directors of the NHA, usually formed by representatives from diverse segments within the local community involving businesses, elected local government officials, educational institutions, nonprofit, and public entities. Whether or not the coordinating entity establishes an advisory board varies by organization. The coordinating entity has the responsibility of managing the federal funds and obtaining matching funds from other sources to implement the management plan and to execute the NHA goals within the designated National Heritage Area.

The management plan typically describes the organizational structure, key stakeholders in the NHA operation, and the strategies to be used for conservation, preservation, and interpretation as well as the funding and management of the program.

### 1.2 Purpose of this Report

This report was prepared on behalf of the National Park Service as part of the evaluation of the Blue Ridge National Heritage Area. In its advisory capacity, the National Park Service is responsible for reporting to Congress on the performance evaluations of the various National Heritage Areas. This report provides documentation of the methods and findings of the evaluation effort undertaken with a focus on BRNHA.

The evaluation was directed at addressing three fundamental questions:

1. Based on its authorizing legislation and general management plan, has the Blue Ridge National Heritage Area achieved its proposed accomplishments?
2. What are the impacts of investments made by Federal, State, Tribal and local government, and private entities in the Blue Ridge National Heritage Area?
3. How does the Blue Ridge National Heritage Area's management structure, partnership relationships, and current funding contribute to its sustainability?

### 1.3 Overview of the Blue Ridge National Heritage Area

The Blue Ridge National Heritage Area consists of 25 counties in Western North Carolina which encompass a unique set of cultural and natural assets. The geographic area includes over 11,000 square miles of mountainous terrain, forests, lakes, streams, farms, and a number of small rural towns. **The cultural assets in the National Heritage Area include a rich repository of traditional music, the third largest concentration of craftspeople in the U.S. and a claim as the origins of the traditional and modern crafting movements, hundreds of Cherokee Indian settlements and artifacts dating back thousands of years, agricultural traditions associated with populations of European and African American settlers who migrated to Western North Carolina, and one of the longest and largest mountain chains in the world.**

The North Carolina mountains and foothills are home to over 570 historic sites including buildings and districts listed in the National Register of Historic Places, the country’s official list of buildings, and sites that are significant in American architecture, archeology, engineering, and culture. Many historic sites in the North Carolina mountains received a further distinction by the Governor’s Year of the Mountains Commission in 1996, which designated select sites as “Cultural Treasures” for their cultural or historic significance to the region.

The Blue Ridge National Heritage Area includes the site of America’s largest home, the Biltmore Estate built by George W. Vanderbilt, which was named a "Top Trending U.S. Attraction" by TripAdvisor in 2017 and attracts more than 1 million visitors a year.

Live music is also a major element in the tourism-based economy of Asheville and the surrounding area, offering opportunities for locals and tourists from around the world to enjoy festivals and live performances.

From the standpoint of natural assets, the Blue Ridge National Heritage Area contains two national park lands—the Great Smoky Mountains and the Blue Ridge Parkway. This area encompasses one of the largest stands of old growth trees in the Eastern portion of the U.S.

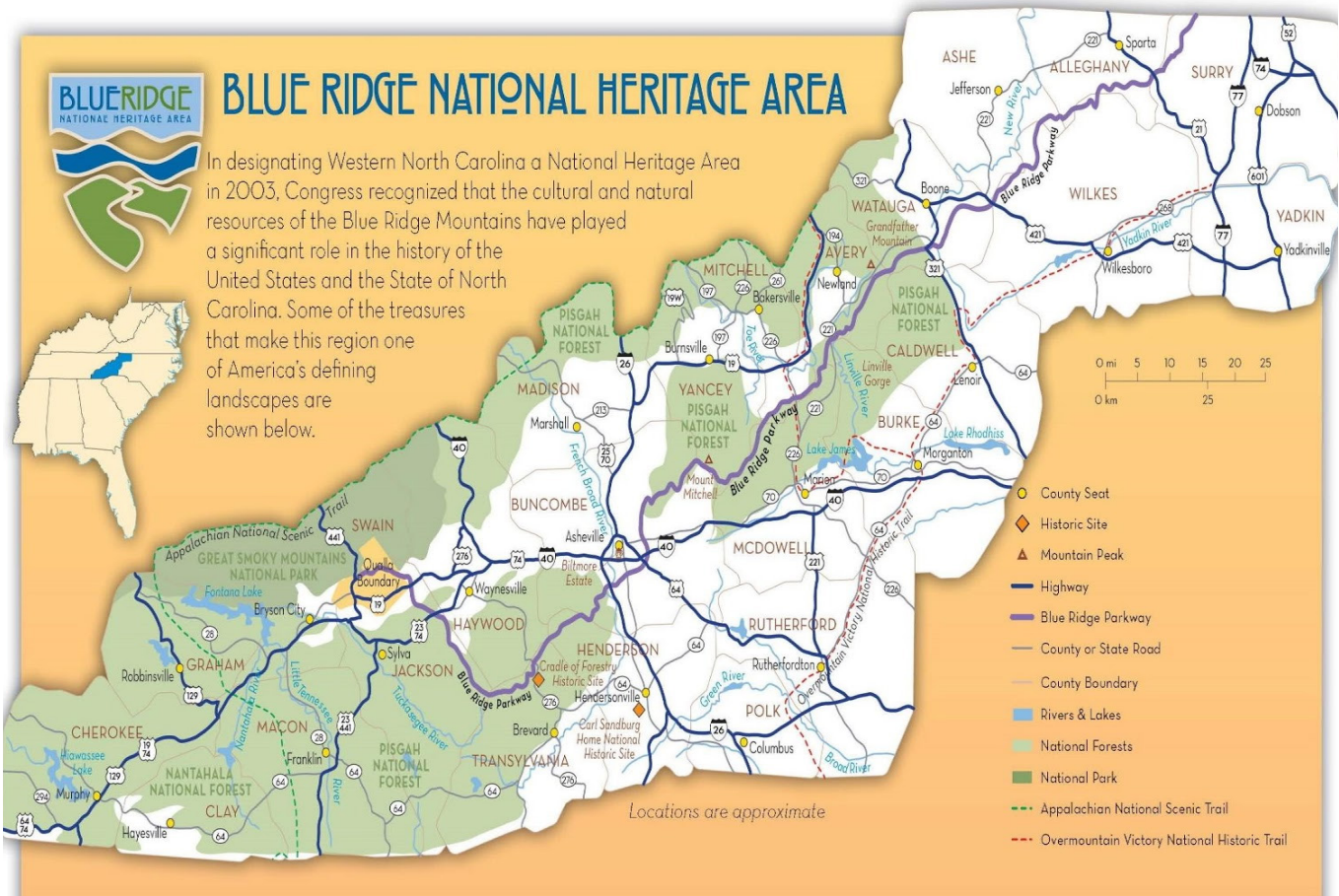
The area has long been cultivated for farming including production of Christmas trees, ornamental plants, mushrooms, herbs and wine grapes. The Blue Ridge area is also popular for hiking, biking, camping and fishing, making the heritage and natural tourism possibilities endless.

<b>Designation</b>	BRNHA was designated as a National Heritage Area in November, 2003 in Public Law 108-108. The goal of the NHA is to preserve, interpret, and develop the cultural and historic traditions of the Blue Ridge region including music, craft, Cherokee, agricultural, and natural heritage
<b>Location</b>	BRNHA is located in Western North Carolina
<b>Area Encompassed</b>	BRNHA encompasses 25 Western North Carolina counties including Buncombe, Henderson, Burke, and Caldwell counties. BRNHA counties cover a population of over 1.2 Million and over 10,400 square miles
<b>National Historic Themes</b>	There are five historic themes: Music Heritage, Craft Heritage, Cherokee Heritage, Agricultural Heritage, and Natural Heritage
<b>Organizational Structure</b>	BRNHA operations are managed by a nonprofit corporation, the Blue Ridge National Heritage Area, Inc. There are seven members of the board of directors who represent a diverse set of skills and sources of contact. These include nonprofit management, fundraising, Cherokee culture, grants management, preservation education, and tourism
<b>National Park Partners</b>	Blue Ridge Parkway, Overmountain Victory Trail, Appalachian Trail, Great Smoky Mountain National Park, and Carl Sandburg Home National Historic Site
<b>Overall Partners</b>	There are currently 1,161 partners - 351 formal and 810 informal - working with the Blue Ridge National Heritage Area, Inc.

**Table 1.1: Overview of the Blue Ridge National Heritage Area**

It should be noted that the number of formal and informal partners reported here may not match numbers reported to the National Park Service. ARCBridge developed these numbers utilizing a database of partners created specifically for this project. This database has been shared with BRNHA for future record keeping and has encompassed all of the program partners identified by BRNHA since 2003. This partner list has allowed ARCBridge to delve into a deeper analysis of BRNHA regional relationships and sustainability efforts which are described in more detail in later sections.

Fig 1.1: Map of Blue Ridge National Heritage Area



## 1.4 Evaluation Methodology

The evaluation methodology employed in this report follows the National Heritage Area Evaluation Guide established by the National Park Service in 2012 and updated in 2016.

The guide provides details regarding a three-phase evaluation process. In this case the process involved 1) Tailoring the evaluation design to the Blue Ridge National Heritage Area, 2) Collecting data and an initial review of results and 3) Analyzing data and documenting results.

### 1.4.1 Tailoring the Evaluation to Blue Ridge National Heritage Area

As part of tailoring the evaluation design, ARCBridge undertook a series of steps including the following:

**ARCBridge worked with BRNHA staff to assemble and review over 150 foundational documents including:**

- Enabling Congressional legislation
- Planning documents such as the Management Plan and Strategic Plans prepared under the auspices of the board of directors
- Formal and informal partnership agreements
- Grant Guides and Grant Outcome Evaluations
- Financial data on income, grants, and expenditures
- Annual reports of the managing entity
- Details regarding organizational structure, membership, and operations

Early in the project the ARCBridge evaluation team visited BRNHA for a meet and greet with NPS officials and BRNHA leadership at the end of January 2017.

During this initial visit, ARCBridge carried out the following activities:

- Met with BRNHA staff and BRNHA Board Members
- Visited several sites and communities within the heritage area to better understand the organization surrounding the NHA program
- Held a preliminary discussion with key BRNHA staff to provide the basis for drafting a BRNHA logic model
- Identified key program inputs, program participants, and various types of program outputs and impacts

#### 1.4.2 Site Introduction and Background Research

As a follow-up to this logic model discussion during the initial visit, the ARCBridge evaluators collaborated with BRNHA staff to develop a preliminary draft of the logic model and organize a more detailed data collection visit. ARCBridge shared this draft model with BRNHA and held calls to revise and refine the logic model to accurately reflect how the ARCBridge team collectively believe the program functions to have an impact in the community.

As part of the background research, ARCBridge carried out a series of additional steps prior to returning to Blue Ridge for the 2nd data collection visit. ARCBridge requested a number of documents from the BRNHA team including various detailed financial records, a complete listing of formal and informal partners who have worked with Blue Ridge, and listings of grants and grant reports associated with funding by BRNHA and their objectives.

**The ARCBridge evaluation team also worked closely with BRNHA staff to develop a set of “greatest hits” case studies to describe program activities that appear to have had significant impact. Along these lines ARCBridge sought to identify program activities that appeared to have an economic impact on local communities, due to increased visitation and tourism, or an impact on preserving cultural or natural heritage features of the area (e.g., teaching youth about local music traditions).** Based upon this set of case studies, ARCBridge prepared a critical review which identifies:

- 1) Preliminary evidence of program impact
- 2) Key questions that needed to be answered and/or verified in order to gauge the impact of programming activities
- 3) Individuals, partner organizations, or types of individuals in the community who would be able to

provide credible evidence of program impact (e.g., teachers who can testify regarding the impact of the Junior Appalachian Music program)

The key questions developed in this critical review document were then used to identify sites and people to interview during ARCBridge's 2nd data collection site visit.

**The ARCBridge team conferred with BRNHA staff over numerous emails and conference calls to determine how best to cover the region where one site could very well be three to four hours in the opposite direction as another key site. ARCBridge evaluators did their own investigating and preliminary interviewing to narrow the list from over 100 potential sites and interviews to a more manageable 40.** During the data collection visit, ARCBridge conducted a series of interviews in the community to provide detailed documentation of program impacts for small towns and by program focus.

**Discussions were held with BRNHA’s Executive Director, BRNHA Board Members, and key partners of BRNHA to understand the program governance process and their views on the program’s development and its history.**

#### 1.4.3 Stakeholder Interviews

During the second data collection site visit conducted by ARCBridge in May 2017, ARCBridge evaluators carried out a series of interviews encompassing the following individuals and sites:

- BRNHA Executive Director, Angie Chandler and Senior Director of Programs, Rob Bell
- Key BRNHA board members like Becky Anderson, Connie Haire, Bobby Raines
- NPS staff from the Blue Ridge Parkway like Superintendent Mark Woods and Public Information Officer Leesa Brandon
- Partner Organizations/Program Sites including:
  - Altapass Foundation
  - Asheville Convention Visitors Bureau
  - Biltmore Company
  - Blue Ridge Mountain Host
  - Southern Highland Craft Guild
  - Cherokee Preservation Foundation
  - Cherokee Homestead Exhibit
  - Cowee School Arts and Heritage Center
  - Cradle of Forestry in American Interpretive Association
  - Magellan Strategy Group
  - Museum of the Cherokee Indian

- Mayor of Hayesville, NC
- National Environmental Modeling and Analysis Center—source of the WNC Vitality Index
- North Carolina Arts Council
- Orchard at Altapass
- Penland School of Crafts
- Toe River Arts Council (Junior Appalachian Musicians Program)
- Craft entrepreneurs

**The purpose of the data collection and in-depth interviews was to gain a better understanding of:**

- **The scope and nature of the activities occurring at each of the program sites**
- **How long the programs had been in operation**
- **How program activities were seeking to have an impact on the specific communities where they were operating**
- **Describing partner relationships with BRNHA**
- **Assessing what would happen to these programs if BRNHA were to no longer receive federal funding**

#### 1.4.4 Data Analysis

Following this visit, ARCBridge carried out a thorough financial review and sustainability analysis to examine the various investments that BRNHA has undertaken and to link those to program outcomes. In the final stage of the work, ARCBridge carried out analysis focused on the three key overall questions requested in the evaluation:

1. Has BRNHA achieved its proposed accomplishments?
2. What are the impacts of investments in the Blue Ridge National Area region?
3. How does the Blue Ridge National Heritage Area's management structure, partner relationships and current funding contribute to its sustainability?

The results of these analyses are detailed in subsequent sections of this report as follows:

#### Section 2 - Overview of BRNHA

This section describes key characteristics of the National Heritage Area, its history, its current organizational structure, staffing, and its track record in developing partners within the community.

#### Section 3 - BRNHA Fulfillment of the Authorizing Legislation and Management Plan

Does BRNHA fulfill the mandate of the authorizing legislation and the management plan? How do these program activities fit into the larger scheme of community impact (via the logic model)? **Section 3 also includes key findings and conclusions that showcase ARCBridge's unique analysis and discoveries throughout the evaluation.**

#### Section 4 - Impact of Public/Private Investments in BRNHA

In this section, ARCBridge analyzes the sources of federal and non-federal matching funds, the level of match that was achieved, and the extent of financial leverage provided by the NHA funds made available by the National Park Service.

#### Section 5 - BRNHA Sustainability

This section of the report describes the concept of sustainability and examines the various elements of sustainability that are present within the BRNHA operation.

##### 1.4.5 Evaluation Limitations

**ARCBridge has taken utmost care and diligence to ensure that the evaluation methodology properly addresses the three questions laid forth in this report. The research team has familiarized itself with the NHA Evaluation Guide and has reviewed examples of nearly a dozen previous NHA evaluations. That said, with the understanding that every NHA has a completely unique set of parameters, every effort has been implemented to capture the specific story of BRNHA. Variances have been discussed throughout the process on NPS monthly conference calls, biweekly BRNHA conference calls, and weekly internal ARCBridge project conference calls.**

For example, in this region, the methodology employed was not always able to directly measure the impact of specific BRNHA programs on individuals and communities. There were several reasons for this including the fact that any BRNHA program activity was conducted in partnership with several other regional organizations, so it was sometimes difficult to specify BRNHA contributions. In addition, without multiple representative statistical surveys of key populations of interest (e.g. tourists in North Carolina), it was not possible to attribute attitudinal differences in opinions of BRNHA sites and programs to public relations and tourism marketing efforts directly undertaken by BRNHA.

It was also very difficult to discern the true economic impact of several projects because of the lack of specific data. Many individual entrepreneurs were unwilling to disclose the financial data necessary to extrapolate statistical trends of economic growth.

**Therefore in order to work around these limitations, the ARCBridge team has implemented the use of several case studies to showcase the impact of BRNHA programs. These case studies and profiles, found within Section 3, allow for a qualitative assessment of the impact of the programs as well as an in-depth analysis of conclusions.**

**ARCBridge believes that these stories allow for a deeper and more personalized level of comprehension of BRNHA's impact on the communities it works with most - small American towns. While these towns are the backbone of American heritage and culture, they are still attempting to recover from a devastating economic recession and have been working with BRNHA to regain economic viability and cultural pride through heritage preservation, interpretation, and development.**

## 1.5 Roles

There were three participating organizations involved in this evaluation effort - an external evaluator (ARCBridge Consulting & Training), the National Park Service, and the Blue Ridge National Heritage Area.

### External Evaluator

ARCBridge Consulting & Training Inc. served as the independent external evaluator for this report. **ARCBridge Consulting & Training Inc., is a woman-owned small business consulting firm with over 25 years experience in local, state, and federal government contracting across the U.S.**

**The ARCBridge evaluation team developed the BRNHA logic model (Section 3), collaborated with BRNHA staff on various aspects of data collection, coordinated site visits, analyzed data, created new statistical findings and observed key organizational trends, and prepared several drafts of this 114 page report which were shared with NPS and BRNHA for further edits.**

ARCBridge updated NPS on various aspects of the evaluation's progress and key accomplishments through monthly conference calls and submitting monthly reports.

**ARCBridge strongly believes that the analysis and conclusions that its evaluation team have chronicled in this report will provide greater insight into BRNHA operations, programs, and future viability as an NHA.**

### National Park Service (NPS)

The National Park Service staff provided the underlying methodology and funding for use in the evaluation and facilitated contacts with the Blue Ridge National Heritage Area through initial conference calls and participation in a meet and greet site visit.

**NPS staff was updated on the project by ARCBridge via monthly progress reports and conference calls and provided invaluable expertise, counsel, and support throughout the project.** NPS staff also provided useful context and background regarding the history of the National Heritage Area program.

### Blue Ridge National Heritage Area

The BRNHA staff and the Blue Ridge National Heritage Area Board of Directors facilitated the evaluation by providing access to the necessary data and coordinating meetings with various individuals and partners who are engaged with BRNHA.

**The BRNHA team provided useful feedback and insights regarding data collection and the meaning of various data elements. While BRNHA was not involved in designing the methodology or carrying out the analysis, they served in a fact-checking role throughout the project to ensure that the evaluation team was provided with accurate information and interpretation of available data and responded to queries promptly with the transparency, thoroughness, and professionalism throughout this entire process.**

ARCBridge provided BRNHA with copies of this report as it was being developed and gave its leadership an opportunity to review and comment on the contents.

## Section 2 - Overview of the Blue Ridge National Heritage Area

This section provides an overview of the physical, geographic, and demographic characteristics of the Blue Ridge National Heritage Area along with a description of the region's history.

This section also contains information regarding the roles and responsibilities of the coordinating entity (The Blue Ridge National Heritage Area, Inc.), its staff, partners, and various stakeholders.

### 2.1 Introduction and History of the Blue Ridge National Heritage Area (BRNHA)

Legislation authorizing the Blue Ridge National Heritage Area (BRNHA) was approved by Congress in 2003. BRNHA consists of 25 counties encompassing over 10,400 square miles in Western North Carolina. The National Heritage Area headquarters shares office space with the Blue Ridge Parkway staff within the National Blue Ridge Parkway Visitor Center in Asheville, North Carolina.

The physical location of BRNHA is close to the borders of Virginia, Tennessee, Georgia, and South Carolina. The Blue Ridge Mountains are part of the Appalachian Mountain Range and are named because of the interesting bluish color that can be observed from a distance. The color is due to hydrocarbon emissions from spruce and fir trees.

The area encompassed by BRNHA was originally inhabited by nomadic hunting peoples as far back as 12,000 years ago. Later, the area was inhabited by various Indian tribes, primarily the Cherokee. The historic, cultural, and spiritual epicenter of the Cherokee is within the boundaries of BRNHA.

Beginning in the early 1600's a large number of immigrants of both European and African descent settled in the Blue Ridge area and left a lasting impression on its landscape, economy, and culture. The cultural artifacts of their presence and those of the Cherokee are felt today in the music, crafts and agricultural practices which are prominent in the region.

#### 2.1.1 Characteristics of the Area Encompassed by the Blue Ridge National Heritage Area

The Blue Ridge National Heritage Area is a unique part of the state of North Carolina in terms of its demography, economy, terrain, and cultural history. **In contrast to the central and eastern parts of the state, this area is less developed, due in some measure to rugged hills and mountainous terrain which is more similar to other parts of Appalachia. The area is less densely populated and more rural with many small towns as population centers.**

The population in this area has lower levels of household income and educational attainment as compared with the rest of the state. Due to this, the economic outlook of BRNHA is more dependent upon tourism (which brings in funds from visitors outside the region) and agricultural pursuits than upon advanced technology and manufacturing.

**In many ways, this makes the Blue Ridge region more dependent economically on National Heritage Area programs that focus on economic development and promotion based on unique natural and cultural attributes that can be traced back to an earlier time in American history.**

In order to develop a profile of BRNHA, ARCBridge captured information provided by the U.S. Census (e.g., 2015 American Community Survey, 2016 Census Population Estimates, 2015 County Business Patterns) and the U.S. Travel Association. This data enabled ARCBridge to draw comparisons between the 25 counties included within the National Heritage Area and the remaining counties in North Carolina (75 counties). The characteristics in this analysis include geographic size, population density, educational attainment, and household income. In addition, the analysis includes data on tourism and agricultural development - two industries that are vital to the future prosperity of BRNHA counties.

### 2.1.1.1 Population and Population Density

Table 2.1 below provides information on the population and land area of the 25 counties encompassed in the Blue Ridge National Heritage Area along with the population and land area for the entire state.

Geography	Population	Land Area (in Square Miles)	Pop Density
<b>State of North Carolina</b>	<b>10146788</b>	<b>48618</b>	<b>208.7</b>
Alleghany County	10848	235	46.16
Ashe County	26924	426	63.2
Avery County	17516	247	70.91
Buncombe County	256088	657	389.78
Burke County	88851	507	175.25
Caldwell County	81449	472	172.56
Cherokee County	27905	455	61.33
Clay County	10915	214	51
Graham County	8558	202	42.37
Haywood County	60682	554	109.53
Henderson County	114209	373	306.19
Jackson County	42241	491	86.03
McDowell County	45075	441	102.21
Macon County	34376	516	66.62
Madison County	21340	450	47.42
Mitchell County	15126	221	68.44
Polk County	20334	238	85.44
Rutherford County	66421	564	117.77
Surry County	72113	532	135.55
Swain County	14346	528	27.17
Transylvania County	33482	379	88.34
Watauga County	53922	313	172.27
Wilkes County	68740	754	91.17
Yadkin County	37532	335	112.04
Yancey County	17670	313	56.45
Total BRNHA Counties	1246663	10417	119.68
Non-BRNHA Counties	8900125	38201	232.98

**Table 2.1: Comparative Population, Land Area, and Population Density of Counties in the Blue Ridge National Heritage Area (Source: U.S. Census, County Population Totals Datasets 2010-2016)**



As shown in Table 2.1, the population of North Carolina is just over 10 million people in an area of nearly 49,000 square miles. For comparison purposes, the population of BRNHA counties is approximately 1.25 million living in an area of over 10,000 square miles. The National Heritage Area constitutes 21.4% of the total land area of the state of North Carolina.

From a population density perspective it is clear that the population density within BRNHA counties is roughly half that of the combination of all of the other counties in the state (119.68 residents per square mile for BRNHA Counties vs. 232.98 resident per square mile for the remainder of the state).

### 2.1.1.2 Educational Attainment and Household Income

County	Total Population Age 25+	High school diploma + Equivalents	Some College	Associates Degree	Bachelor's Degree	Graduate Degree	Non-HS Grad	Median Household Income 2015
<b>State of North Carolina</b>	<b>6,582,301</b>	<b>1,755,955</b>	<b>1,435,877</b>	<b>589,399</b>	<b>1,213,587</b>	<b>653,178</b>	<b>934,305</b>	<b>\$46,868</b>
% of Population		26.68%	21.81%	8.95%	18.44%	9.92%	14.19%	
Alleghany County	8,021	2,702	953	811	941	452	2,162	\$36,276
Ashe County	20,219	6,371	2,762	2,101	2,575	1,221	5,189	\$37,777
Avery County	13,061	3,978	2,117	1,035	1,444	1,026	3,461	\$45,167
Buncombe County	177,725	43,927	27,376	14,840	39,446	24,301	27,835	\$50,332
Burke County	62,854	18,704	8,715	6,595	6,719	4,075	18,046	\$35,763
Caldwell County	57,620	18,228	7,761	5,091	5,591	2,290	18,659	\$34,662
Cherokee County	20,475	6,790	3,028	1,805	2,374	1,428	5,050	\$34,662
Clay County	7,938	2,327	1,625	792	979	701	1,514	\$37,076
Graham County	6,016	2,100	1,093	294	582	281	1,666	\$34,805
Haywood County	43,917	12,561	7,002	5,408	6,443	4,070	8,433	\$42,257
Henderson County	80,661	21,268	13,466	7,261	14,786	8,252	15,628	\$46,448
Jackson County	26,024	7,182	3,772	2,351	4,548	3,137	5,034	\$38,015
McDowell County	31,920	11,775	4,295	3,245	2,994	1,307	8,304	\$35,765
Macon County	25,318	7,543	4,125	2,594	3,777	1,927	5,352	\$47,746
Madison County	14,865	4,609	1,811	1,382	1,918	1,309	3,836	\$37,904
Mitchell County	11,213	3,751	1,548	1,163	1,232	656	2,863	\$37,391
Polk County	15,436	4,194	2,128	1,423	2,870	1,965	2,856	\$53,470
Rutherford County	47,325	15,045	6,870	5,186	4,936	2,713	12,575	\$35,636
Surry County	50,895	15,842	6,402	5,416	5,071	2,504	15,660	\$36,164
Swain County	9,839	3,073	1,698	950	1,049	514	2,555	\$33,731
Transylvania County	24,546	6,978	4,078	2,050	4,265	3,022	4,153	\$37,656
Watauga County	28,821	5,889	4,709	2,382	6,122	4,935	4,784	\$33,232
Wilkes County	48,785	15,694	6,726	4,433	4,451	1,804	15,677	\$39,847
Yadkin County	26,486	9,075	3,284	2,790	2,226	939	8,172	\$46,704
Yancey County	12,982	4,311	2,032	1,227	1,678	822	2,912	\$37,484
<b>BRNHA Counties Total</b>	<b>872,962</b>	<b>253,917</b>	<b>129,376</b>	<b>82,625</b>	<b>129,017</b>	<b>75,651</b>	<b>202,376</b>	<b>\$39,439</b>
% Population	13.26%	29.09%	14.82%	9.46%	14.78%	8.67%	23.18%	
<b>Non-BRNHA Counties</b>	<b>5,709,339</b>	<b>1,502,038</b>	<b>1,306,501</b>	<b>506,774</b>	<b>1,084,570</b>	<b>577,527</b>	<b>731,929</b>	<b>\$48,161</b>
% Population	86.74%	26.31%	22.88%	8.88%	19.00%	10.12%	12.82%	

**Table 2 2: Comparison of Blue Ridge National Heritage Area Counties with the Rest of North Carolina in terms of Educational Attainment and Median Household Income (Source: 2011-2015 American Community Survey, U.S. Census Bureau)**

Table 2.2 reveals that in a comparison between the Blue Ridge counties and the rest of the counties in North Carolina, the Blue Ridge counties had a smaller percentage of persons 25 and older who had some college (14.82% vs. 22.88%), and who had received a Bachelor's degree (14.78% vs. 19%) and a larger percentage of individuals who did not graduate high school (23.18% vs. 12.82%).

In some sense this condition is a function of history and geography. The Blue Ridge area is more remote and less densely populated than the rest of the state, making it more difficult to cost-effectively provide high quality education to all of the residents of this area.

This picture of more limited educational attainment in the Blue Ridge counties is consistent with the finding in Table 2.2 which shows a considerably lower average median (by about 20% lower) household income in the Blue Ridge counties when compared with the rest of the state (\$39,439 in Blue Ridge counties vs. \$49,161 for the remainder of the state).

### 2.1.1.3 Tourism in the BRNHA Counties

In order to examine the relative amount of tourism revenue and expenditures in counties in the Blue Ridge National Heritage Area, the ARCBridge team drew upon economic travel statistics compiled by the U.S. Travel Association for the North Carolina Department of Commerce.

This data reflects 2013 estimates and capture travel expenditures, travel industry payroll in the county, travel employment as well as state and local tax receipts. In ARCBridge's analysis, the evaluation team compared the results from the Blue Ridge counties with the rest of the state.

The data is expressed on a "per population" basis to provide comparability across the different regions within the state. These results are shown below in Table 2.3.

Region	Tourism Expenditures	Annual Payroll	Employment	State Tax Receipts	Local Tax Receipts	Population
	\$ Millions	\$ Millions		\$ Millions	\$ Millions	Thousands
BRNHA Counties	\$3,245.56	\$661.03	31,360	\$168	\$130	1,247
State total	\$21,961.21	\$5,272.08	211,520	\$1,126	\$661	10,146
Remainder of State	\$18,715.65	\$4,611.05	180,160	\$957	\$531	8,899
Regional Contribution to State Totals	14.78%	12.54%	14.83%	14.94%	19.72%	12.29%
Regional Per Capita	\$2.60	\$0.53	2.52%	\$0.13	\$0.10	
Remainder of State Per capita	\$2.16	\$0.52	2.02%	\$0.11	\$0.07	

**Table 2.3: Comparison of Blue Ridge National Heritage Area Counties with the Rest of North Carolina in terms of Tourism Revenue and Expenditures (Data provided by Steven Moore, Ph.D., Director of Hospitality and Tourism Department, Western North Carolina University.)**

As Table 2.3 reveals, the state brought in nearly \$22 billion in travel expenditures. The Blue Ridge National Heritage Area counties brought in over \$3 billion in travel expenditures, which on a per person basis is a proportional share compared to the population the rest of the state. Similarly, BRNHA counties provide a proportional contribution in travel payroll per resident relative to counties in the remainder of the state. Interestingly, BRNHA counties have slightly higher tourism employment levels of per resident employment (i.e., 2.52% vs. 2.02%) as well as slightly higher state and local tax revenues (per capita).

This data makes it clear that the Blue Ridge National Heritage Area is keeping pace in tourism relative to the non-NHA regions of North Carolina. This is interesting since the assets of natural beauty in the area and the recreational opportunities created by those assets provide an attractive basis for tourism that may not exist in some other areas of the state. In addition, the tourism strength of Asheville is a key contributing factor in the area's tourism position.

These results are consistent with a recent press release, *Blue Ridge Parkway Community Connections Make Dollars and Sense, May 6, 2017*, from the Blue Ridge Parkway which indicated that in 2016, visitors to the Blue Ridge Parkway spent nearly \$980 million in communities near the national park. Those expenditures supported 15,649 jobs with an overall impact of approximately \$1.3 billion.

#### 2.1.1.4 Agricultural Activity in the BRNHA Counties

In order to examine the level of agricultural activity in counties in the Blue Ridge National Heritage Area, ARC-Bridge drew upon the 2012 Census of Agriculture (compiled by the U.S. Department of Agriculture) to develop a comparison between BRNHA counties and the rest of North Carolina.

The data from the Census of Agriculture is collected every five years. As of the 2012 survey, there were just over 50,000 farms across the state, encompassing 8.4 million acres of land. BRNHA counties contained nearly half of all farms, but only utilized about 16% of the land area (1.3 million acres) used across the state for farming.

The 75 remaining counties in North Carolina also had about half of the farms (nearly 26,000 farms), but used considerably more land for farming (just over 7 million acres). This data makes clear the fact that farms in the Blue Ridge area are smaller than those found in the rest of the state. Presumably, this smaller size is a result of the more rugged and mountainous terrain within BRNHA area of Western North Carolina.

The smaller size of farms in the Blue Ridge area may explain why the average farmland market values are lower in BRNHA counties than they are in the rest of the state (i.e., \$562,000 compared to \$883,000).

Table 2.4 also reveals that the average net annual income from farms in BRNHA is considerably less than the rest of the state (i.e., approximately \$9,200 vs. \$104,000 in the rest of the state). This may also be a reflection of the smaller farms in BRNHA counties.

The total net agricultural income from the group of counties in the BRNHA region was only \$176 million while the rest of the state generated a net annual income of \$2.7 billion. Clearly, Blue Ridge counties reap proportionately less benefit from agricultural products than the remaining counties in the state.

Geography	# of Farms	Farmland (in acres)	Avg Mkt Value of Land per Farm	Net Avg per Farm Cash Income	Total Net Farm Cash Income (\$000)
State of NC	50,218	8,414,756	\$726,944	\$57,042	\$2,864,522
BRNHA Counties	24,455	1,343,821	\$562,339	\$9,191	\$176,123
Rest of State	25,763	7,070,935	\$883,192	\$104,351	\$2,688,399

**Table 2.4 Comparison of Blue Ridge National Heritage Area Counties with the Rest of North Carolina in terms of Agricultural Activity and Farm Income (2012 Census of Agriculture – County Data, US Department of Agriculture, National Agriculture Statistics Service)**

## 2.2 Introduction and History of the Blue Ridge National Heritage Area Partnership

The Blue Ridge National Heritage Area Partnership was designated as the management entity through the enabling legislation (Blue Ridge National Heritage Act of 2003) passed by the 108th Congress in November 2003. Following the authorization, the Partnership installed a board of directors and adopted a set of bylaws (March 2004) guiding the activities of the board and the Partnership.

AdvantageWest and HandMade in America were the key founders of BRNHA. The Partnership was incorporated (Blue Ridge National Heritage Area, Incorporated) in March 2005 under the auspices of AdvantageWest (which served as a fiscal agent for the Partnership). The Partnership separated from AdvantageWest in 2007.

### 2.2.1 Authorizing Legislation and BRNHA Vision and Mission

In the authorizing legislation, the mission of BRNHA is to preserve, interpret, and develop cultural, historical and natural assets encompassing:

1. Music heritage and musical traditions reflecting a culture that is shared in other mountain areas in Virginia, Tennessee, and Georgia
2. Craft heritage, including leadership of the country's traditional craft movement (1800s to early 1900s) as well as the contemporary craft movement (1940s). Today the region is contains the 3rd largest concentration of craftspeople in the U.S. (more than 4,000 crafts people in the 25 BRNHA counties), which has a \$206 million impact
3. Cherokee heritage, including artifacts, places, and people from the Eastern Band of Cherokee Indians
4. A strong agricultural heritage, with the largest number of specialty crop farms in North Carolina
5. The significant natural beauty of an area, which contains numerous mountains over 6,000 feet in elevation and various other geological features that provide a large area for outdoor recreational pursuits and greater plant diversity than anywhere else in temperate North America. This greater diversity is, in some measure, due to variance in elevation of the area

As expressed in the Blue Ridge National Heritage Area Strategic Plan (adopted in September 2010), BRNHA has five strategic goals including:

#### GOAL 1: PARTNERSHIPS

**Cultivating regional and national partnerships that value BRNHA'S mission and vision and provide collaborative opportunities to meet mutually beneficial goals**

#### GOAL 2: RESOURCES

**Securing a diverse base of resources for organizational sustainability that is responsive to current and future economic and cultural conditions**

#### GOAL 3: INITIATIVES AND PROGRAMS

**Connecting heritage themes to the region through signature projects that elevate regional and national awareness of BRNHA's value and support preservation, interpretation, and development of the region's heritage assets**

#### GOAL 4: OPERATIONAL CAPACITY

**Securing and providing resources to comfortably manage the organization's strategic goals, meet legal requirements, and implement best practices**

#### GOAL 5: BRANDING, IDENTITY, & COMMUNICATION

**Strengthening the Blue Ridge National Heritage Area's brand identity regionally and nationally**

BRNHA's vision is expressed in five distinct "themes" that have been established to preserve, interpret, and develop different cultural, historic, and natural aspects of the Blue Ridge National Heritage Area with the goal of improving local economic conditions:

- Music Heritage
- Cherokee Heritage
- Craft Heritage
- Natural Heritage
- Agricultural Heritage

The development of these heritage assets is aimed at involving the community in the process to ensure sustainability over the long term.

## 2.2.2 The BRNHA Organizational Structure

Blue Ridge National Heritage Area, Inc. is a not-for-profit entity which manages the funds, personnel, and programs developed to fulfill the mission of the NHA. BRNHA's Board of Directors has seven members with deep knowledge of the Western North Carolina Community. As shown in Table 2.5, board members reflect diverse backgrounds in:

- Fundraising and higher education
- Rural community economic development
- History and archives (in higher education)
- Traditional music
- Cherokee culture
- Foundation leadership
- Banking industry
- Operations and marketing
- Regional tourism,
- Historic preservation
- African American history
- Economic development

**It is clear that the scope of expertise represented on the board reflects the focus on tourism and economic development and ensures an emphasis on Cherokee concerns. In addition, it should be noted that the members of the board of directors have each been engaged with BRNHA for no less than six years and one of the members of the Board has been associated with the program since before the Heritage Area concept was approved by Congress.**

In 2017, BRNHA, Inc. had nine staff members. Five were full-time, four were part-time staff. The full-time staff included the following positions and roles:

### 1. Executive Director

Tasks include organizational management, strategic planning, fundraising, board relations, partner relations, and trails programming

### 2. Senior Director of Programs

Tasks include grants management, program development, research, and compiling the Traditional Artist Directory

### 3. Director of Visitor Services

Tasks include managing the visitor desk, NPS relationships, management of part-time Visitor Center staff, volunteers, groups, events and meetings, brochures, and assist the Executive Director for Fund Development

### 4. Finance and Administrative Manager

Tasks include finance, organizational insurance and records management, inventory, policy and procedure development, contracts and procurement, staff benefits and personnel records, grant reporting, and NPS reporting

### 5. Digital Communications & Public Relations Manager

Tasks include: media relations, Heritage Trail website, social media and e-newsletters, BRNHA Tourism Partnership Council, Blue Ridge Heritage Trail Partners, and Host Group relations

Part-time staff include the following:

### 6. Administrative Assistant

Tasks include support to the Executive Director, organizational support, calendar, inventory and sales, events and meetings

### 7-9. Three BRNHA Visitor Services Clerks

Tasks include helping to staff the Blue Ridge Parkway Visitor Center desk, answer phones, and field questions

Contractors include:

- Blue Ridge Music Trails Website Events Management Contractor for tradeshow, booth management, and online retail software
- Blue Ridge Music Trails Content Specialist for Facebook page, BRMT e-news and BRMT event and meeting support

Table 2.5 on the next page shows the portfolio assignments for each member of the board of directors and their relevant backgrounds in terms of being resource for BRNHA.

BRNHA Board Members	Time Involved	Officer	Task Force/ Committees	Expertise
<b>Connie Haire</b>	Board member since 2011 (6 Years)	Board Chair/past Treasurer	Audit Committee/ Resource Development Committee	Fundraising, Economic Development, Higher Ed
<b>Becky Anderson</b>	Involved in BRNHA concept since mid 1990's and played a key role in designation. Board member since 2003. (14 years)	Treasurer/past Chair and Organization Co-founder	Audit and Resource Development Committee, Marketing Committee, Grants Committee	Place-Based Rural Community and Economic Development, Culture and Craft, Nonprofit Director, Fundraising
<b>Karen Paar</b>	Board member since 2011 (6 years)	Past Chair, past Vice Chair	Grants Committee, Resource Development Committee and Interpretation Committee	Higher Education, History and Archives, Traditional Music
<b>Bobby Raines</b>	Board member since 2012 (5 years)	Vice Chair, past Secretary	Resource Development Committee	Eastern Band of Cherokee Indians Member, Nonprofit Leader, Funder, Cherokee Culture
<b>Cathy Robbins</b>	Board member since 2007 (10 years)	Appointed by the Governor of N.C. Past Chair	Marketing/ Communications Committee Chair	Tourism connection, owns major attraction, formerly worked within the banking industry
<b>Millie Barbee</b>	Board Member since 2011 (6 Years)	Appointed by the Governor of N.C.	Grants Committee Chair	Regional Tourism, Historic Preservation, Conservation and Downtown Development
<b>Darin Waters</b>	Board member since 2011 (6 years)	Secretary	Interpretation Committee	African American History, Higher Education, Economic Development

**Table 2.5: Board of Director Experience, Tenure, and Portfolio Assignments**

## 2.3 BRNHA Relationships with National, Regional, State, and Local Partners

As outlined in BRNHA's 2011-2016 Strategic Plan (adopted in 2010), the number one strategic priority for BRNHA was partnerships. These partnerships include:

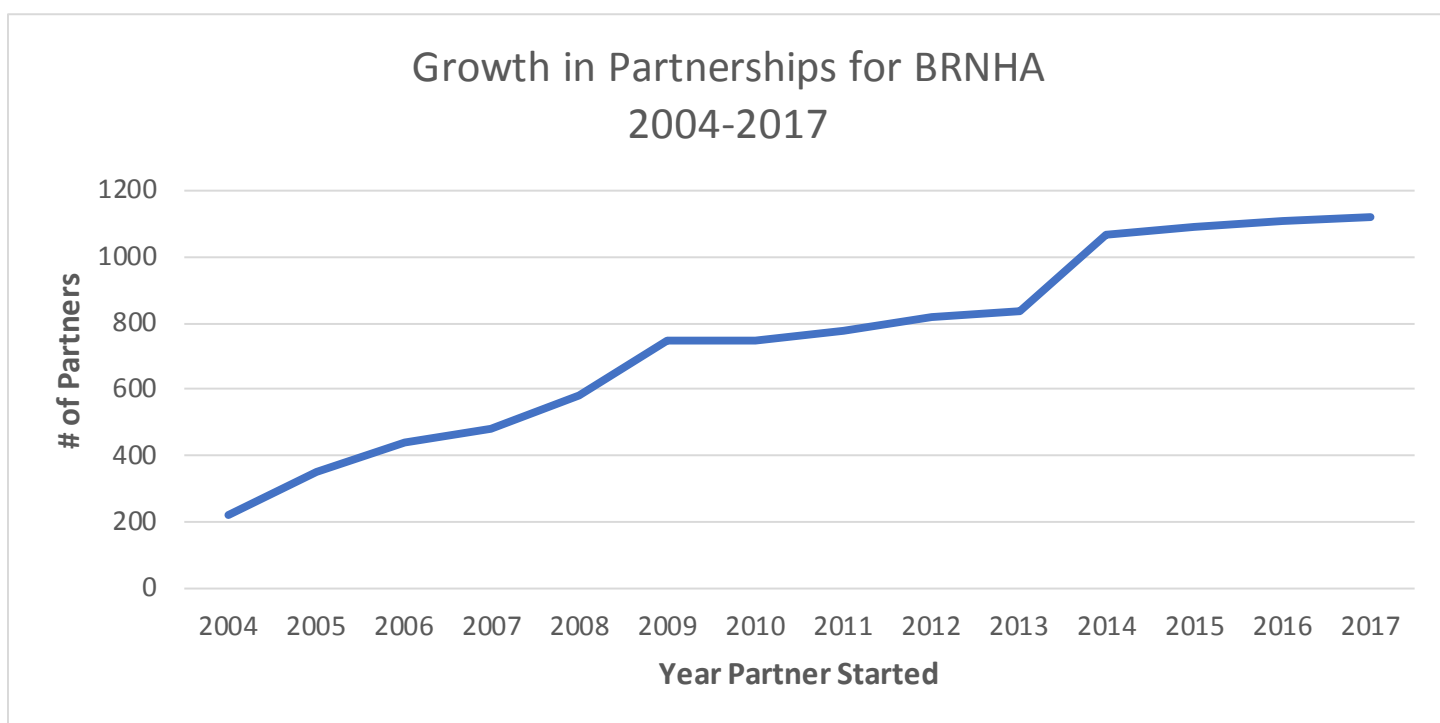
- National partnerships (e.g., National Park Service, Appalachian Regional Commission, and Alliance of National Heritage Areas)
- Regional partnerships (e.g., HandMade in America)
- State partnerships (e.g., the North Carolina Arts Council and Western Carolina University)
- Local partnerships (e.g., numerous towns and counties in Western North Carolina, artisans and musicians in the local community)

As expressed by BRNHA's Executive Director, the Heritage Area has sought partnerships with institutions and individuals who can contribute to the aims of the program, either in terms of financial support, marketing and promotional support, or through their ability to leverage

resources in the community (e.g., manpower to develop facilities or train/educate the community about the heritage mission).

With that overall strategy in mind, the Heritage Area embarked on a long term effort to develop a strong base of formal and informal partners. To better understand partnership development, ARCBridge worked with the Heritage Area staff to develop a database of partnerships that could be used to identify the activities and level of commitment of BRNHA partners.

As shown in Chart 2.1 below, BRNHA efforts have resulted in the development of 1,161 partnerships over the period between the start of the program in FY2004 through FY2017.



**Chart 2.1: Growth in Partnerships for BRNHA 2004-2017**

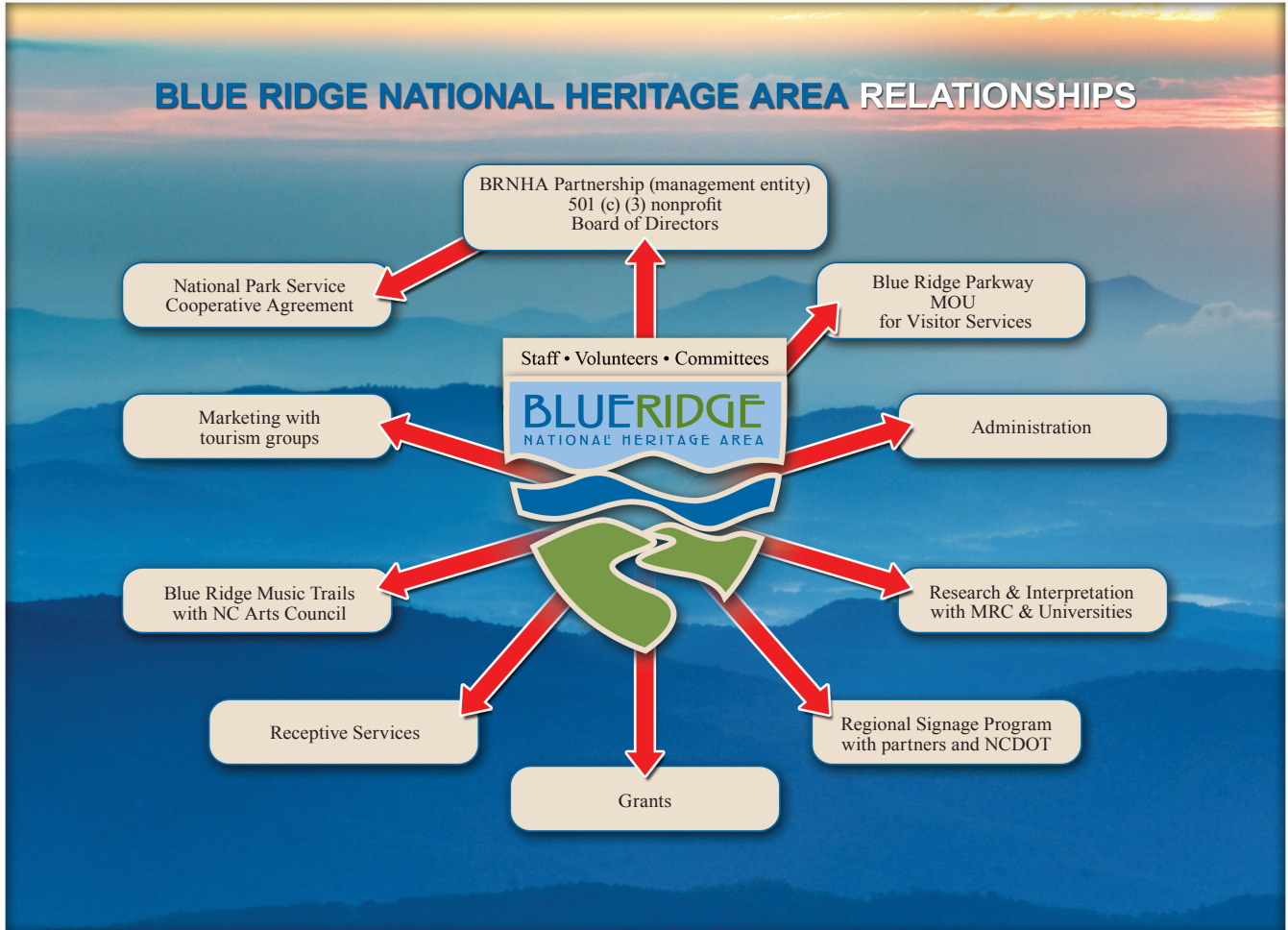


Fig. 2.1: BRNHA Relationships (insert from BRNHA provided materials)





Fig. 2.2: BRNHA Partnerships (insert from BRNHA provided materials)

**Of the partners that were active in the program, 30% (or 351) had formal, written agreements with BRNHA.**

Table 2.6 below shows the actual numbers and percentages of new partners drawn into the program on an annual basis over the program's history.

Year Started	# of New Partners	Cumulative Number of Partners	% of New Partners by Year Started
2004	220	221	0.198
2005	131	351	0.118
2006	90	441	0.081
2007	40	481	0.036
2008	98	579	0.088
2009	166	745	0.15
2010	0	745	0
2011	33	778	0.03
2012	42	820	0.038
2013	14	834	0.013
2014	229	1063	0.206
2015	27	1090	0.024
2016	19	1109	0.017
2017	10	1119	

**Table 2.6: Annual Growth of BRNHA Partners**

While there are 1,161 partners overall, partial information, specifically the number of years a particular partner was active, is missing from 42 cases. Therefore those cases are not reflected in the table above. The reason these cases are missing is because it was not information that BRNHA was asked to track by NPS.

The number of added partners in 2017 is an estimate and until the data from 2017 is audited, ARCBridge cannot definitively indicate how many new partners were acquired in FY2017.

**The early years of BRNHA saw a significant number of partnerships formed, especially in 2004 (220 new partners) and 2005 (131 new partners), due to the fact that BRNHA was a new entity and wanted to forge alliances with older established regional organizations in the community rather than step on toes in a crowded space.**

ARCBridge has noted that growing partnerships became a significant priority for BRNHA in conjunction with the development of the 2008 Management Plan as seen in 2008 (98 new partners) and 2009 (166 new partners).

While partnerships continued to be the number one strategic priority in BRNHA's 2011-2016 Strategic Plan, there was an overall shift towards strengthening existing relationships with the over 700 existing partners rather than seeking new alliances (hence zero partners were added in 2010 and only 33 in 2011).

**ARCBridge has determined from the underlying partnership data that there were some specific innovations by BRNHA that resulted in substantial growth in partnerships. For example:**

- **The development of the artist directory in 2007 created connections with musicians and craft artists throughout the area**
- **The signage program began in 2005 and expanded in 2014 and again in 2016, which made the Heritage area more visible to tourists and to local residents**
- **The Blue Ridge Music Trails program began in 2013 and connects artists, music venues, and tourists to BRNHA programs and activities**
- **The continuation of BRNHA's grants program supports organizations enabling them to further contribute to the Heritage program's objectives**

From this data ARCBridge has found that once these innovative programs were put into place, an increase in partnerships followed.

For example, 2014 saw a spike of 229 partners due to new relationships that had to be sought out to promote BRNHA signature products, like the Blue Ridge Music Trails (which in itself consists of a network alliance of more than 100 music venues, artists, and festivals). Once this large number of new partners were added in 2014, BRNHA staffers again focused the following years (2015-2017) on maintaining and developing these relationships rather than seeking out more.

### 2.3.1 Strength and Sustainability of Partnerships

BRNHA has fostered positive relationships with the Washington and Atlanta offices of NPS and with the local operations of the Blue Ridge Parkway.

Several BRNHA staff members share office space with the NPS Blue Ridge Parkway team in the Visitor Center in Asheville, N.C. This leads to a strong working relationship between Parkway staff and BRNHA staff.

Parkway staff frequently participate in BRNHA Board meetings to provide updates on developments along the Parkway. One of the Parkway staff members also serves on the team that reviews grant proposals made by BRNHA.

To further illustrate the value of BRNHA's strong relationship with local NPS representatives, ARCBridge interviewed local officials like Blue Ridge Parkway Superintendent Mark Woods. Woods, who recently retired in July 2017, described the positive impact felt in the communities surrounding the Blue Ridge Parkway:

**“The existence of BRNHA has cultivated a level of vitality to the area. Without the Heritage Area, neighboring communities, organizations, small businesses, and non-profits would each be on their own. BRNHA knits the communities together in terms of cultural history and the arts and has created a mechanism to pull those groups together in a way that provides a high level of energy in this region.**

*BRNHA staff also have a strong physical presence in the Blue Ridge Parkway Visitor Center engaging with visitors and informing them regarding the surrounding communities. Their workers and volunteers offer a knowledge base of community leaders and stakeholders and have enabled me (as Superintendent of the Blue Ridge Parkway) to meet other community leaders.*

*BRNHA provides a conduit for providing visitors with information about different events, communities, and places to stay while promoting local artisans and musicians that we (the Parkway) would not easily connect with otherwise. For example, BRNHA provided a connection to the Feast to the Beat program which attracted many visitors that we would not have reached otherwise. The presence of the Heritage Area has positively influenced the number of visitors.”*

*- Mark Woods  
Superintendent, Blue Ridge Parkway*

*“BRNHA expands the reach into the local community for the National Park Service, leading to increased capacity.”*

*- Leesa Brandon  
Spokeswoman, Blue Ridge Parkway*

### 2.3.2 Partners View of BRNHA

Several of BRNHA's long-term partners have expressed strong support for the activities of the National Heritage Area and are grateful for its contributions in the region. These comments are meant to be illustrative and are not meant to be comprehensive. However, they do reflect the views of several long-term partners.

One of BRNHA's local partners is the Biltmore Estate National Historic Landmark which worked with BRNHA on a hospitality training program. Biltmore believes there is an “strong alignment” between both organizations stemming from a mutual focus on tourism. **In speaking to more than a dozen major partners, ARCBridge has recognized a common sentiment - partners appreciate and agree with BRNHA's focus on regional development, and view BRNHA as the force that glues the region.**

Another local partner, the Asheville Convention and Visitors Bureau (ACVB) had worked closely with HandMade in America to generate publicity for tourism in the Asheville area. BRNHA has helped shape the messaging and promotional efforts. When HandMade went out of business, BRNHA stepped up to fill the void.

*“BRNHA took the lead, particularly where there were other organizational breakdowns. We go back to the Heritage Area as the institutional partner for information and for bringing all of the regional entities together. BRNHA provides a global vision for the region.”*

*- Marla Tambellini  
VP Marketing/Deputy Director, ACVB*

A representative from another partner, the Cradle of Forestry, pointed out that “All five of the National Heritage Area themes coincide with the Cradle of Forestry site”. Because of this, the Cradle of Forestry decided to rebrand its 6,500 acre campus as a Cradle of Forestry Heritage site.

### 2.3.3 Sustainability of Partnerships

The ARCBridge team examined the number of fiscal years over which specific partners have been actively engaged with the program. On average, partnerships are active for 6 years or more, while 45% of the partnerships have been active for 8 years or more.

It should be recognized that recent partners who engaged in the program since 2014 cannot yet exhibit long periods of involvement.

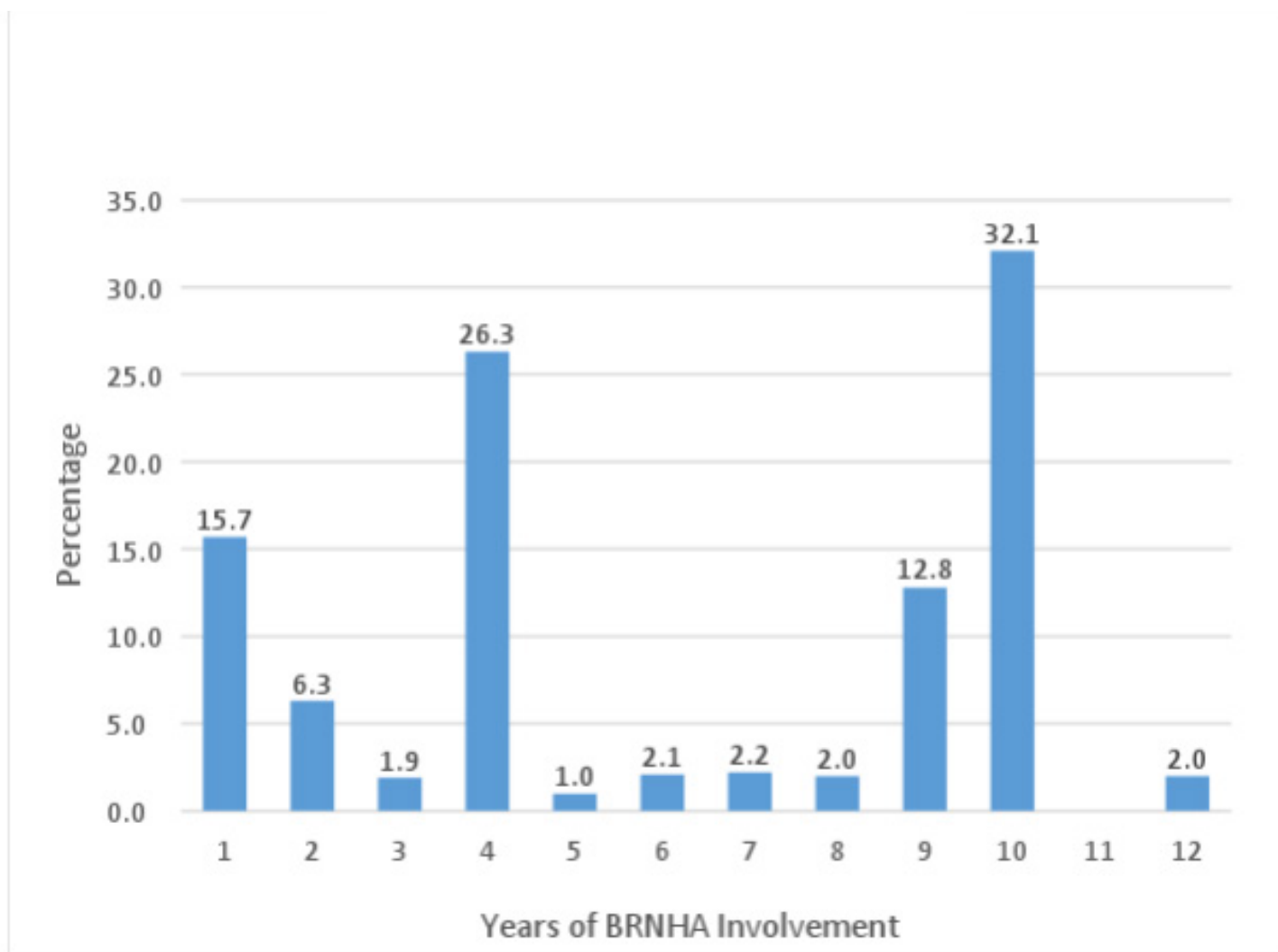


Chart 2.2 shows the distribution of partners characterized by their years of BRNHA involvement

As the chart suggests, ARCBridge believes this partnership program is a sustainable element of the BRNHA portfolio. Approximately 50% of BRNHA partners have been actively involved with the organization for five or more years. Thus, most of BRNHA's partners have had significant experience in working with the NHA.

Earlier it was noted that between 2004 and 2017, BRNHA has developed 1,161 partners. Of these, ARCBridge estimates that 848 (or 73%) were still actively involved in the program as recently as FY 2017. ARCBridge believes this speaks volumes about the long-term commitment of BRNHA's partners.

## 2.4 BRNHA Chronology and Key Events

The development of what is now the Blue Ridge National Heritage Area began in 1996. **After discussions with more than 40 sources, ARCBridge has assembled some of the most important milestones in this process. This chronology is outlined below over the course of four phases of development:**

- 1996-2003 - the **first phase** involves the formative period beginning in 1996, when the Heritage Area was first envisioned by a small group of individuals, and spans until 2003, when the Blue Ridge National Heritage Area Act was approved by Congress
- 2004-2009 - the **second phase** of development entails the launch and staffing of BRNHA in 2004 and culminates in the completion of the BRNHA management plan in 2008 and the hiring of the current Executive Director in 2009
- 2009-2012 - **third phase** involves the transition of the organization from a start-up operation to a fully functional entity and its maturation into an organization that reflects grassroots input. This period began in 2009 and culminates in the development of various business and marketing plans and investments in the Western North Carolina Vitality Index
- 2013-present - **fourth phase** is one in which the organization is investing in unique signature projects that can attract outside investments to best leverage federal funds and pave the way to long-term sustainability

### Phase I--Formative Years and Establishment

- 1996 - Discussion about the concept of creating a Heritage Area in Western North Carolina
- 1996-2000 - Blue Ridge Initiative involving the Blue Ridge Parkway, the North Carolina Arts Council, Museum of the Cherokee Indian, and HandMade in America focused on developing trails that cross from North Carolina into Virginia
- 2001 - AdvantageWest (A regional economic development firm) began work on the concept of a Blue Ridge National Heritage Area
- 2002 - AdvantageWest and HandMade in America produced the Western North Carolina National Heritage Area Feasibility Study & Plan
- 2003 - Representatives from AdvantageWest and HandMade in America testify before Congress
- 2003 - The Blue Ridge National Heritage Area Act of 2003 (Public Law 108-108) is passed by Congress on November 9, 2003

### Phase II--Launching, Staffing and Management Plan

- 2004 - BRNHA is launched with a board of directors, AdvantageWest is selected as the fiscal agent, and a program director is hired to assist AdvantageWest in managing the start-up of the nonprofit
- 2004 - A sub-grants program providing funds to communities and generating match is launched and managed by the program director
- 2005 - BRNHA Board of Directors agrees to incorporate and request 501(c)(3) tax-exempt status
- 2005 - The first BRNHA Executive Director is hired
- 2005 - Memorandum of Understanding signed with the North Carolina Department of Commerce through the Division of Tourism, Film, and Sports Development for five heritage officers
- 2005 - DOT and Cherokee Preservation Foundation funding is awarded to create a regional system of interpretative signage and marketing materials at 70 natural and cultural heritage sites

- 2005 - Local planning phases of the BRNHA Management Plan are completed in 25 WNC Counties, which results in the creation of individual county heritage plans
- 2005 - Four sub-regional workshops were held to strengthen collaboration between arts and tourism organizations
- 2005 - BRNHA hosted two four-day Gateway Communities Training Conferences to provide county heritage councils with tools and resources to fund and implement projects
- 2006 - BRNHA conducted a second competitive grant cycle, awarding 20 grants totaling over \$330,000
- 2006 - BRNHA conducted a series of regional strategy sessions with key stakeholders and heritage council partners to identify Management Plan priorities within each thematic area of focus
- 2006 - A full-time administrative assistant is hired, along with a part-time consultant to prepare website content
- 2006 - First BRNHA website with 160 pages launched
- 2006 - First tourism research study published
- 2006 - Branding and Marketing Plan is completed and includes plans for public relations, branding, and cooperative advertising
- 2007 - BRNHA becomes an independent nonprofit and separates from AdvantageWest
- 2007 - BRNHA moves into offices in the Blue Ridge Parkway Visitor Center. Partnership signed with Parkway to operate a visitor information desk and support programming at the Blue Ridge Parkway Visitor Center
- 2007 - State appropriates \$450,000 to BRNHA to cover two years for staffing, branding, technology
- 2007 - A third competitive grant cycle awards 18 grants totaling \$340,000
- 2007 - Volunteer services coordinator hired
- 2007 - Sponsorships secured for 22-foot-long interactive map of Parkway; the I-Wall at the Blue Ridge Parkway Visitor Center
- 2007 - First "Gather 'Round the Blue Ridge" annual meeting held at Biltmore Estate with 200 partners attending
- 2007 - Traditional Artist Directory launched online
- 2008 - BRNHA hosts an annual meeting of the Alliance of National Heritage Areas
- 2008 - Interactive kiosks debut at the Visitor Center supported by state tourism funds, an earned income product, called the "Blue Ridge Go Card" is unveiled, the first BRNHA visitor map brochure is designed and distributed, and the first regional public relations campaign, entitled, "Living Traditions" is launched
- 2008 - BRNHA Management Plan submitted and approved by Department of Interior
- 2009 - New, expanded blueridgeheritage.com launched. Brand advertising launched in regional/state publications and cooperative advertising program launched in conjunction with three regional host groups: Smoky Mountain Host, Blue Ridge Mountain Hosts, and High Country Hosts
- 2009 - BRNHA launches training program for partners focused on non-profit management, grant writing and fundraising
- 2009 - Expanded Traditional Artist Directory with 400 artists launched online
- 2009 - New Executive Director is hired
- 2009 - Conducted a fourth competitive grant cycle, awarding 19 grants totaling over \$250,000

### Phase III--Transition To Maturity as Grass-Roots Based Organization

- 2010 - State funding discontinued during Great Recession and Heritage Officer Program is eliminated
- 2010 - Support and participation in 75th anniversary of the Blue Ridge Parkway
- 2011 - BRNHA Board approves and launches first ever strategic plan and partner research
- 2011 - Conducted a 5th competitive grant cycle, awarding 20 grants totaling over \$245,000
- 2011 - Director of Marketing and Communication becomes full-time position
- 2011 - Tourism Partnership Council convened
- 2011 - Co-sponsored partner events to engage new partners and to expand knowledge and support of BRNHA
- 2011 - First DVD produced
- 2011 - First visitor survey completed at Parkway Visitor Center
- 2011 - I-Wall, kiosk projects, and Blue Ridge Go Card found to be monetarily unsuccessful
- 2011 - Federal funding reduced
- 2012 - Speakers Bureau and "Proud to be Part of The Blue Ridge Heritage Campaign" launched
- 2012 - Contractor is hired for the Heritage Trail to help complete the signage project
- 2012 - Completed visitor survey/economic impact study for Blue Ridge Music Trails

- 2012 - BRNHA became the first major investor in the Western North Carolina Vitality Index, an online economic development and planning tool providing metrics on transportation networks, employment and income levels, agriculture, biological diversity, air quality, arts and culture, and other topics for 27 WNC counties
- 2012 - Business plan developed for group bus tours

#### Phase IV--Development of Signature Projects to Obtain Investment to Leverage Federal Funds

- 2013 - Blue Ridge Music Trails (BRMT) launched as BRNHA signature project
- 2013 - Blue Ridge Music Trails of North Carolina guidebook with CD published and 12 listening sessions held throughout the region to get input on the development of the trails
- 2013 - Group tour program continues with workshops on best practices and publicity
- 2013 - Economic impact study for BRNHA commissioned
- 2013 - Conducted a sixth competitive grant cycle, awarding 18 grants totaling over \$225,000
- 2013 - "Gather 'Round the Blue Ridge" marks 10th anniversary of BRNHA - 10th Anniversary Video and Annual Report is produced
- 2013 - BRNHA signs a two-year contract with Hand-Made in America to provide entrepreneurial training to craft artisans throughout Western North Carolina
- 2014 - Economic impact study of heritage tourism in BRNHA region published and shows that BRNHA and its heritage tourism partners contributed \$2.39 billion to the Western North Carolina economy and supported 30,000 jobs annually
- 2014 - New website for Blue Ridge Music Trails launched
- 2014 - Two contractors hired for Blue Ridge Music Trails, and grant funding is awarded by the NC Arts Council, beginning a strong partnership between the two organizations
- 2014 - Blue Ridge Music Trails programs/marketing products launched including: website and social media channels, "Traditions" concerts and retail items to produce earned revenue, completion of map brochure, stage signage, and six workshops held to help partners connect to the Blue Ridge Music Trails
- 2015 - Conducted a seventh competitive grant cycle, awarding 22 grants totaling over \$170,000
- 2015 - Sponsored a traditional music concert in downtown Asheville for Blue Ridge Parkway Commemorative Quarter release
- 2015 - Hired public relations firm to develop social media and public relations campaign for BRMT
- 2015 - Promoted and hosted group tours in region and received a grant from the Cherokee Preservation Foundation to support group tours in Smoky Mountain region
- 2015 - Major grants from the Appalachian Regional Commission, Duke Energy, Biltmore and Blue Ridge Electric help fund hospitality training workshops
- 2015 - Grant from North Carolina Arts Council begins three-year strategic planning development process
- 2015 - Planning consultant hired for business development
- 2016 - Blue Ridge Music Trails research shows the trails are benefiting music venues, sites, and festivals and that audiences are increasing, with more than 125 partners signed on to the initiative
- 2016 - Received funding for the launch of the Blue Ridge Craft Trails project
- 2016 - Completed four hospitality training workshops with webinars and a mystery shopping program
- 2016 - Completed Blue Ridge Heritage Trail website and signage program with 70 regional sites, including printed map brochures and visitor kiosks at five state Welcome Centers
- 2016 - Blue Ridge Music Trail social media training workshops held
- 2016 - "Gather 'Round" annual meeting celebrated 100th anniversary of National Park System and North Carolina State Parks
- 2016 - Hosted "Feast to the Beat" event at the Blue Ridge Parkway Visitor Center to celebrate 100th anniversary of National Park System
- 2016 - BRNHA, along Blue Ridge Parkway partners, served 135,771 visitors in the Parkway Visitor Center with materials distributed from 150 heritage partners. Nearly 900,000 visitors have been served in the Visitor Center which opened in December 2007
- 2017 - Conducted an eighth competitive grant cycle, awarding 21 grants totaling over \$180,000
- 2017 - BRNHA awarded 21 grants, totaling \$180,000, bringing to the cumulative total to 154 grants in the region, totaling over \$2.1 million. These grants leveraged another \$4.2 million in state, local and private contributions resulting in a 2:1 match for each federal dollar spent on the program



Blue Ridge Mountains, N.C.

## Section 3 - BRNHA Fulfillment of the Authorizing Legislation and Management Plan

### 3.1 Goals and Objectives of BRNHA

The authorizing legislation for the Blue Ridge National Heritage Area (BRNHA) was enacted by the US Congress in 2003 to highlight the unique contributions of the Blue Ridge Mountain region to the US and world history.

Specifically, the Blue Ridge Mountain chain is one of the oldest, longest, and most ecologically diverse on Earth and a major tourism attraction. The region has been home to the Eastern Band of Cherokee Indians for thousands of years, with many cultural traditions that continue to be practiced today. Modern contributions to American society include being a wellspring of traditional music, as well as the birthplace of the traditional craft movement. The BRNHA Act of 2003 sought to protect these cultural and natural resources while also promoting heritage tourism through a partnership with the Blue Ridge Parkway, state agencies and non-profit organizations.

The key congressional goal stated within the BRNHA Act of 2003 is as follows:

*“To foster a close working relationship with, and to assist, all levels of government, private sector, and local communities in the state in managing, preserving, protecting, and interpreting the cultural, historical, and natural resources of the National Heritage Area (NHA) while continuing to develop economic opportunities.”*

*- The BRNHA Act of 2003, US Congress*

The authorizing legislation and BRNHA Management Plan have recognized these contributions in five distinctive themes:

- Music Heritage
- Craft Heritage
- Cherokee Heritage
- Agricultural Heritage
- Natural Heritage

The following page describes the specific contributions of these five themes on US heritage and culture, as described within the authorizing legislation act.



## Natural & Cultural Contributions as Designated by the U.S. Congress

### 1. Music Heritage

- National recognition has made this region one of the richest repositories of traditional music and folk life
- Comprised of distinctive styles including string band, bluegrass, ballads, blues, and sacred music



Blue Ridge Music Trails banner

### 2. Craft Heritage

- Influenced by the Cherokee
- BRNHA is the birthplace of the traditional craft movement starting in 1900, and the contemporary craft movement in the 1940's
- Third largest concentration of craftspeople in the US (over 4,000)



Display at the Penland School of Crafts Gallery

### 3. Cherokee Heritage

- Dating back thousands of years and offering significant cultural traditions practiced by the Eastern Band of Cherokee Indians
- Includes authentic tradition bearers, historic sites, and historically important collections of Cherokee artifacts



Outdoor Cherokee homestead exhibit in Hayesville, N.C.

### 4. Agricultural Heritage

- Cherokee agricultural heritage, including medicinal and ceremonial food crops combined with historic European patterns of raising livestock
- Largest number of specialty crop farms in North Carolina



A 100-year-old apple orchard in Spruce Pine, N.C.

### 5. Natural Heritage

- The Blue Ridge Mountains form one of the longest and oldest mountain chains in the world
- Main incentive for tourism, attracting a variety of tourists, many of whom relocate to the area



Switzerland Inn in Spruce Pine, N.C.

### 3.1.1 Congressional Authorizing Legislation

This section summarizes the mandates set forth within the Congressional authorizing legislation. In addition to identifying the purposes of BRNHA, the legislation also elaborated on the foundational components that must be included in the creation of a management plan to develop BRNHA, recommended the types of projects that should be prioritized, and designated guidelines for the allocation of annual federal funds.

#### Key Goals:

1. Foster close working relationships and assist government, private, and local communities to manage, preserve, and protect resources of BRNHA
2. Establish and maintain interpretive exhibits
3. Develop recreational, educational, and economic opportunities
4. Increase public awareness of and appreciation for cultural, historical, and natural resources

The Congressional authorizing legislation also advocated giving priority to projects that facilitate the preservation of the significant cultural, historical, natural, and recreational resources of the Heritage Area and include provisions for educational, interpretive, and recreational opportunities that are consistent with the National Heritage Area (NHA) resources.

The authorizing legislation called for the BRNHA Management Plan to include the following types of information:

- Recommendations and strategies for conservation, funding, management, and development of BRNHA
- An inventory of cultural, historical, natural, and recreational resources
- Ways to include all partner organizations involved in the management plan
- An interpretive and educational plan for BRNHA
- Recommendations for policies that develop inter-governmental cooperative agreements
- Analysis for ways federal, state, and local programs may best be coordinated

Funds can be used to make grants to enter agreements with state, nonprofits, and individuals, hire and compensate staff, and enter into contracts for goods/services. BRNHA does not provide grants for festivals, concerts, books, fundraising, paid advertising, or buying real estate.

### 3.1.2 BRNHA Management Plan (2008-2018):

Following the BRNHA Act of 2003, BRNHA founding members developed a 10-year Management Plan and Environmental Assessment in partnership with and approved by the United States Department of the Interior. Federal funds used to implement the Management Plan are administered through the National Park Service's (NPS) Division of Parks and Partnerships, Southeast Region, based in Atlanta, GA.

#### Mission:

According to the 10-year BRNHA Management Plan (2008-2018) submitted to Congress, the mission of the BRNHA, is to “protect, preserve, interpret and develop the unique natural, historical and cultural resources of Western North Carolina (WNC) for the benefit of present and future generations, and in so doing to stimulate increased economic opportunity in the region.”

*“Preserving heritage capital, both for its intrinsic value and as a means of stimulating improved economic opportunity.”*

*- BRNHA Management Plan*

#### Key operational objectives:

- Partnerships are acknowledged as the principal means of executing the plan
- Goals, objectives, strategies, and actions are established for the **preservation, interpretation, and development** (see Fig 3.1) of each of the five heritage themes
- Integrating each of the heritage preservation, interpretation, and development goals (see Fig. 3.1) so that they complement rather than compete with each other
- Stimulate economic activity in the region using heritage resources, but without compromising the qualities of those resources that make the region so distinctive
- Lead to long term benefit to both economic and environmental systems, and improvements in the quality of heritage resource experiences for residents and visitors alike

The BRNHA Management Plan focuses on three major program areas across the organization’s five heritage themes of music, craft, Cherokee, agricultural, and natural heritage (see Figure 3.1 below). The three program areas include:

**Preservation:**

- Help ensure that natural, historic, and cultural resources are sustained for future generations

**Interpretation:**

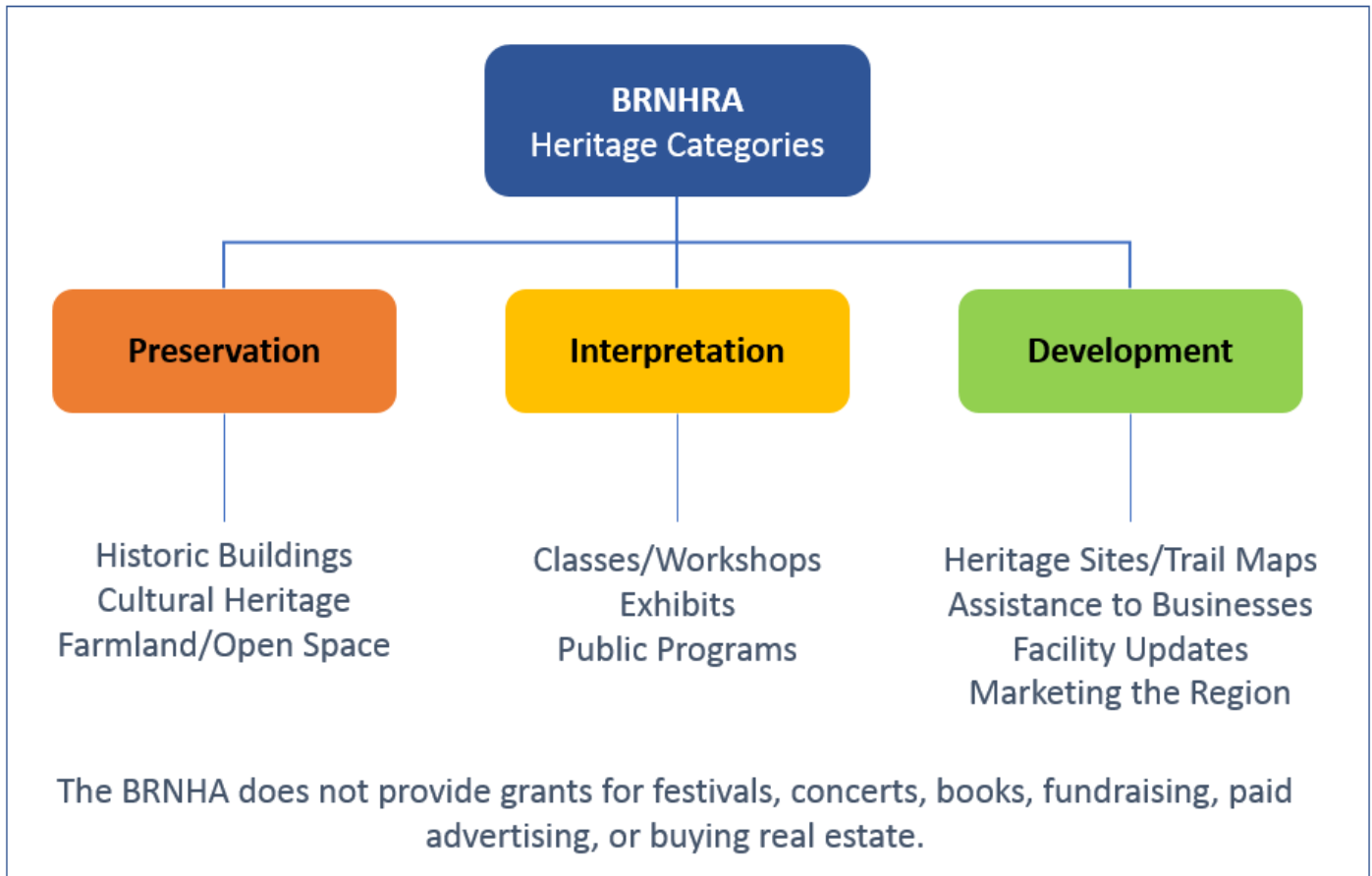
- Foster a new generation of Western North Carolinians who will learn about and come to appreciate their heritage

- Communicate the value of that heritage to citizens and encourage stewardship
- Share heritage and cultural assets with visitors
- Inspire citizens as well as visitors to support preservation of heritage assets

**Development:**

- Support, promote, and provide opportunities for heritage resources to be developed in a sustainable way to generate positive economic returns for the region

The charts on the following pages (Fig 3.2-3.5) map out the logic model for BRNHA, depicting the relationships between BRNHA goals, resources, major programs, supporting programs, and inputs and outcomes.



**Fig 3.1: Program Areas**

**Fig 3.2: Logic Model - Key Themes and Goals**

<b>Goals</b> From BRNHA Management Plan			
<i>Theme</i>	<i>Preservation</i>	<i>Interpretation</i>	<i>Development</i>
<b>Music Heritage</b>	Continuation of WNC musical traditions	Increase awareness of region's musical traditions	Increase profitability and income of music operations and musicians in the region
<b>Craft Heritage</b>	Continuation of WNC hand crafting traditions	Increase awareness of region's hand crafting traditions	Increase profitability and income of craft operations and crafters in the region
<b>Cherokee Heritage</b>	Preserve historically and culturally important sites and artifacts	Increase awareness of Cherokee culture and contributions	Increase income of Cherokee artisans and of the Tribe
<b>Natural Heritage</b>	Preservation of landscapes of natural heritage significance	Increase awareness of natural assets	increase income derived from natural heritage resources
<b>Agricultural Heritage</b>	Maintain base of productive agriculture and continue those traditions	Increase awareness of region's agricultural heritage	Increase profitability and income of farming operations and farmers

**Fig 3.3: Logic Model - Additional Supporting Programs**

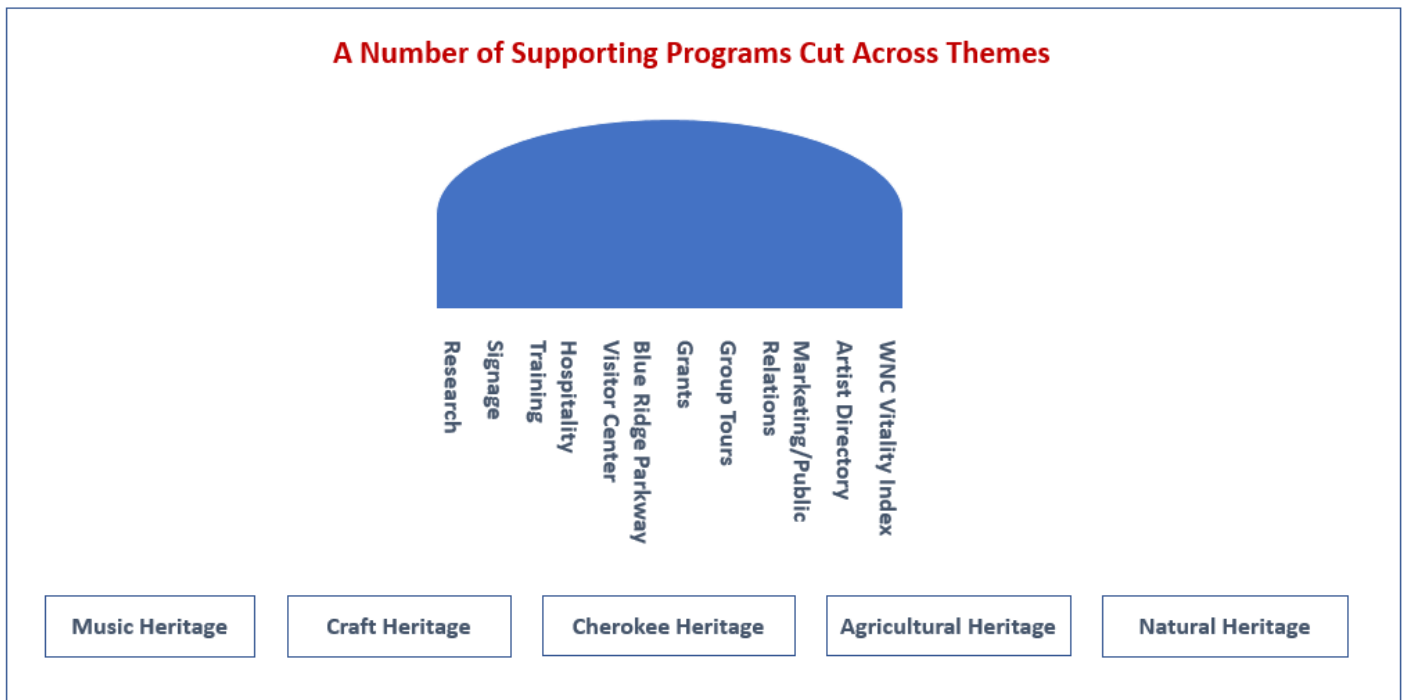


Fig 3.4: Logic Model - Heritage Theme Program Examples

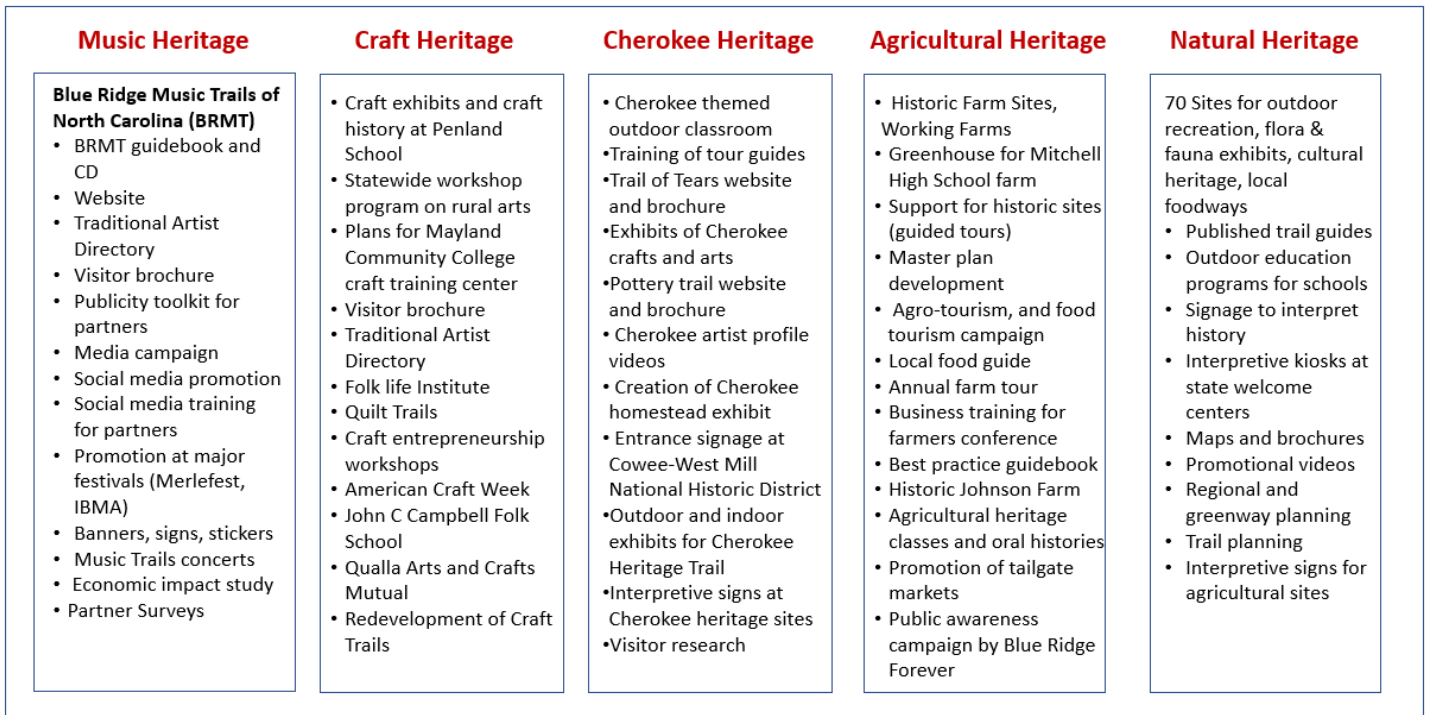
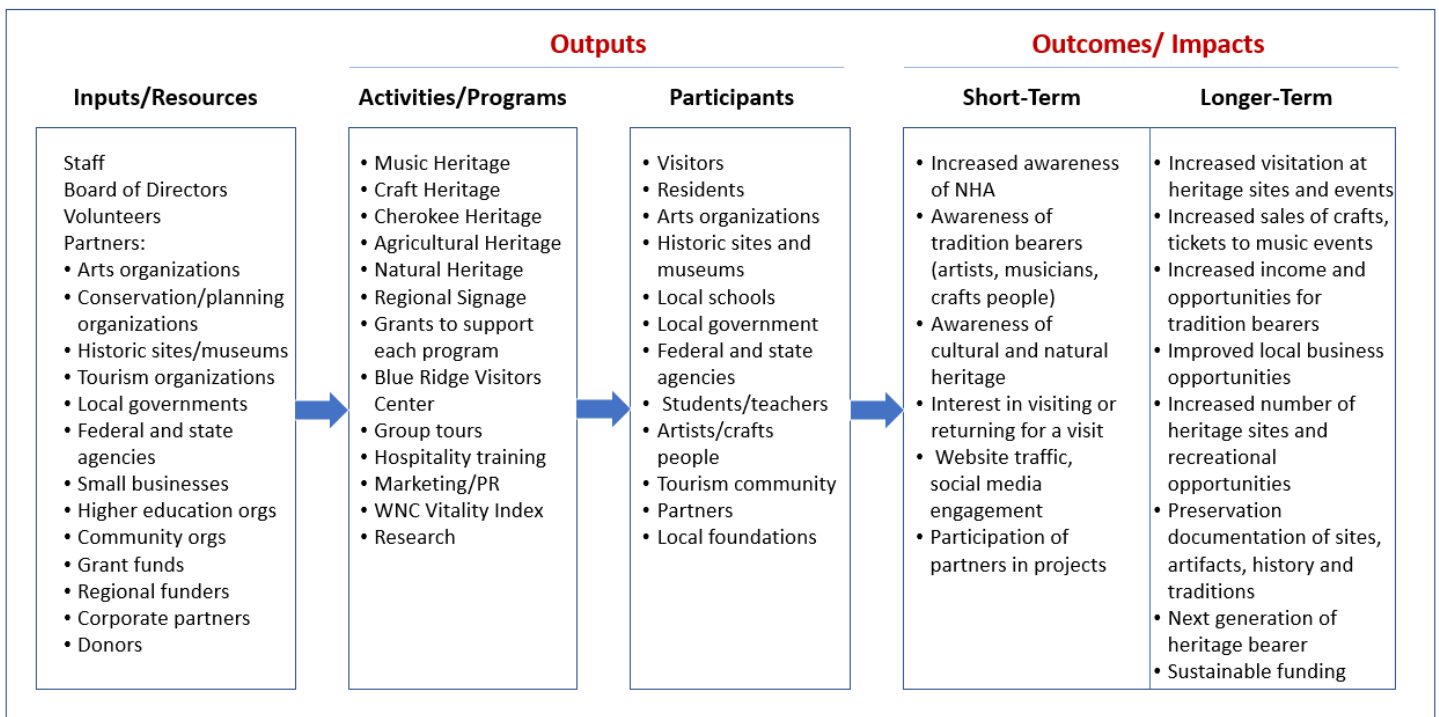


Fig 3.5: Logic Model - Inputs and Outcomes



## 3.2 Grants

### Mission Statement:

To help accomplish the goals and objectives of the Management Plan, the Blue Ridge National Heritage Area Partnership, a 501(c)3 nonprofit, will offer matching grants to provide and leverage funding for new projects across the region that preserve, interpret, and develop heritage resources within these thematic areas and that expand economic opportunity.

### Overview of Grants:

Since 2004, BRNHA has awarded 154 local grants totaling more than \$2.1 million to 97 local organizations. Since 2007, grants have been distributed on a bi-annual basis in accordance to BRNHA funding and are open to local academic institutions, nonprofits, federally recognized Indian tribes, and units of state and local government for projects serving the 25 counties of BRNHA. Grant recipients must focus on one or more of the five core interpretive themes (music, craft, Cherokee, agricultural, and natural heritage) and must have already secured matching funding. The current grant match total is \$3.7 million. Figure 3.7 and Figure 3.8 detail the grant cycle schedule and summarize key grant numbers.

Grant giving has allowed BRNHA to further increase its brand awareness and reach throughout the vast region. The BRNHA logo is included on all associated project materials, including websites, event brochures and handouts, and press releases to the media and government officials.

Several of these local grant projects have garnered regional and national media recognition and press:

1. Production of an hour-long documentary film about pioneering forestry educator Carl Schenck and the Cradle of Forestry which aired on 40 PBS television stations
2. The music documentary series *David Holt's State of Music* also aired nationwide on PBS, with the Blue Ridge Music Trails (BRMT) having a 10 second slot in the underwriting pod that appears before and after each broadcast. The series has had 1,500 telecasts in 25 states.

Fig 3.7: Grant Cycle Timeline



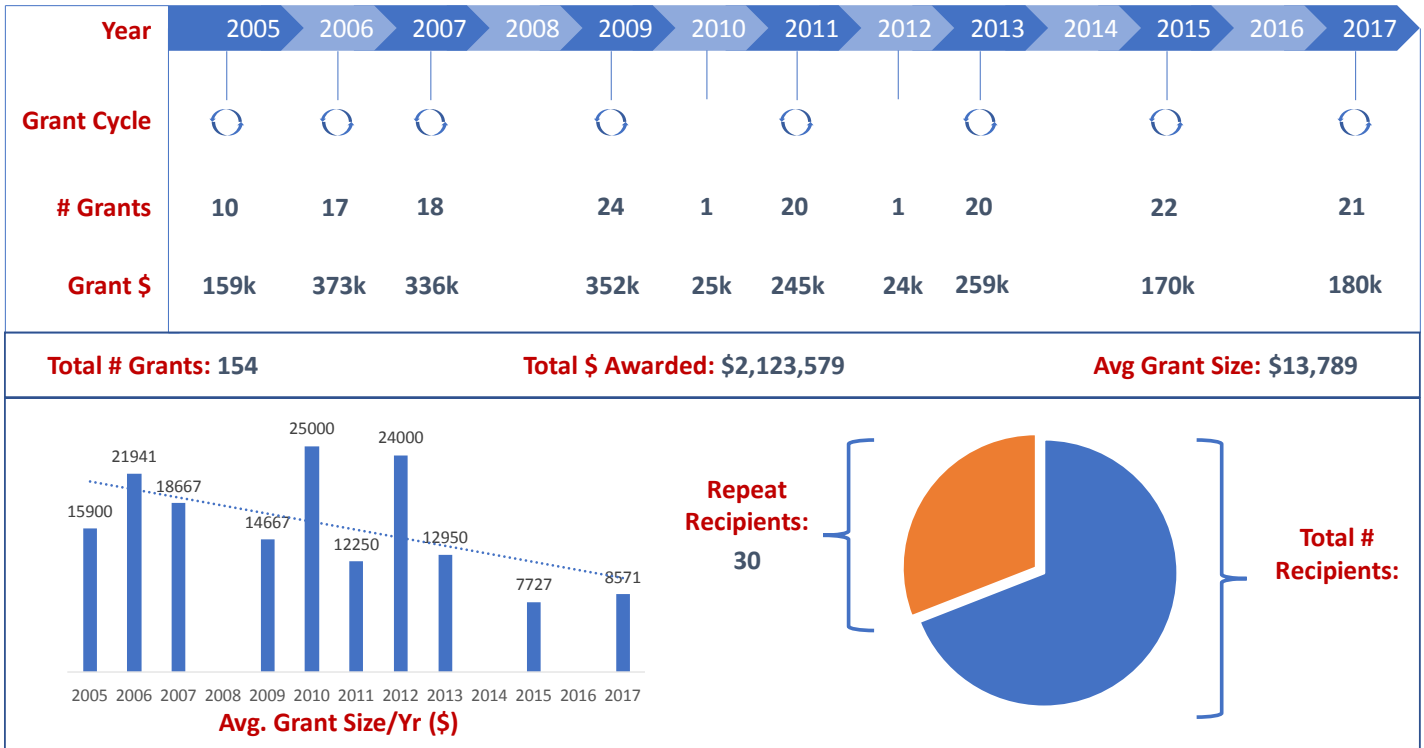


Fig 3.8: Summary of Grants

**Committee:**

The grants committee consists of six to eight members:

- Typically two of the committee members are BRNHA board members
- A BRNHA board member has always chaired the committee
- One member represents a federal partner (National Park Service)
- Two members represent a state agency (Department of Natural and Cultural Resources)
- Other committee members are selected for geographic representation and expertise in arts, tourism, cultural heritage, and/or natural heritage

**Grant Evaluation Criteria:**

BRNHA evaluation criteria include significance of the heritage resources, public benefit, and sustainability projects that can continue beyond the life of the grant. Of particular interest to the Blue Ridge National Heritage Area Partnership are projects that:

- Are regional or multi-county in scope
- Involve active partnerships between organizations
- Leverage substantial matches from project participants and other grantors

## History and Evolution

For the 1st grant cycle (2004/2005), a handful of key BRNHA partners were invited to apply, with larger amounts of funds allocated to 10 organizations including HandMade in America (\$55,000), NC Folklife Institute (\$39,000), Penland School of Crafts (20,000), and the Southern Highland Craft Guild (\$30,000).

Starting in 2006, BRNHA engaged a much broader array of partners through the management planning process and believed it was important to establish an open and more competitive process.

After skipping the annual grant giving cycle in 2008 and 2010 to allocate funds for staffing, marketing, and signature initiatives, BRNHA decided in 2011 to officially work on a biannual cycle, and lower the money awarded. This was part of an effort to show that BRNHA is more than just a grants giving organization. This decision came around the time when they had made enough partnerships and marketing strides to move onto signature projects, such as the Blue Ridge Music Trails (BRMT) program.

**ARCBridge has found that BRNHA grant funding has gone down steadily by almost 50% in the past 10 years. In 2007, \$340,000 was awarded, while in 2017 that number was only \$180,000. Median grant amounts have also gone down from \$18,000 to \$8,000. The number of grants has remained consistent, with an average of 20 per cycle, still allowing reach into a range of smaller communities, but focusing on more fine-tuned projects. The following trends have also been observed:**

- In its last three grant cycles ('13, '15, '17), BRNHA has directed a larger proportion of its funding to music heritage projects to support its signature program, BRMT of North Carolina
- BRNHA created a new category ("Music Venue Improvements") to help fund facility upgrades (such as sound systems, seating, lighting, and dance floors) at traditional music venues that are managed by a local government entity or a nonprofit organization
- BRNHA has funded different projects from the same organizations over multiple grant cycles
- The small mountain town of Hayesville (pop. 300) has received six grants from the BRNHA, allowing for preservation, interpretation, and developmental efforts

## Grants Conclusion

**Since 2004, BRNHA has awarded 154 local grants totaling more than \$2.1 million to 97 local organizations. ARCBridge believes these grants have been incredibly effective in allowing BRNHA to expand its reach and facilitate major projects across the five heritage themes in a very diverse and geographically expansive region.**

**These grants have allowed BRNHA to serve in the unique role of an incubator for original ideas to promote preservation, interpretation, and development in dozens of small towns. By shifting the focus over the years to allocating smaller grants from \$1000-\$5000 to a larger pool of organizations, ARCBridge commends BRNHA's two-fold strategy, i.e.,**

- **Opening up of funding and resources to focus on larger signature programs to cement regional leadership**
- **Allowing many smaller projects to get off the ground that otherwise would not have, but that have far reaching impacts in rural communities that often feel neglected**

*"We have always wanted to be more than a grant-making organization and are now transitioning into more signature programs as well."*

*- Rob Bell  
Senior Director of Programs, BRNHA*





Junior Appalachian Musicians Attending a Class

### 3.3 Music Heritage

The BRNHA Music Heritage program has a mission to preserve the legacy of music traditions, educate new generations on traditional music, and develop a new heritage tourism product for economic impact and regional branding.

**BRNHA has supported music heritage preservation, interpretation, and development efforts by providing 56 grants since 2005, roughly 28% of the total 154 grants. \$507,086 or 24% of total federal funding allotted to grants was spent on projects promoting music heritage including:**

- Awarding grants to preserve and restore historic music halls
- Creating new music venues in smaller communities
- Fostering educational music opportunities for a new generation of youth in economically depressed local communities through after school programs as well as social studies curriculum
- Funding an award-winning documentary by Mars Hill University, *A Mighty Fine Memory: Stories and Tunes from the Fiddler of Banjo Branch*, to help share the legacy of master fiddler Roger Howell of Madison County. Screening in various festivals in the South, it won a Spotlight Film Award and has been licensed by UNC-TV for broadcast
- Compiling and promoting a Traditional Artists Directory (TAD) to help give local artists exposure and economic opportunities to showcase their talents to the wider public
- A signature Blue Ridge Music Trails (BRMT) program to create brand recognition and tourism through a BRMT website, published guidebook, and partnership with over 100 local music venues and events

Fig 3.9 Examples of Music Heritage Projects

Fiscal Year	Project	Counties Served	Dollars Awarded/Expended
2005	Music park development in Todd, NC	Ashe, Watauga	\$5,000
2006	Musical play about WPAQ's live "Merry-Go-Round" radio broadcast	Surry	\$10,000
2007	Documentary film about Mrs. Hyatt's "Opera House"	Buncombe	\$10,000
2007	Biographical play about music preservationist Bascom Lamar Lunsford	Buncombe, Madison	\$20,000
2007	Creation of online Traditional Artist Directory	WNC region	\$30,580
2008	CD anthology of traditional music in far-western WNC	Cherokee, Clay, Macon	\$10,000
2008	Web-based exhibit of folksongs collected in WNC	Ashe, Watauga, Wilkes	\$19,166
2008	Traditional music exhibit at Wilkes Heritage Museum	Wilkes	\$7,016
2008	Start up of three Junior Appalachian Musicians (JAM) programs	Buncombe, Madison	\$25,000
2009	Musical play about African American music pioneer Lesley Riddle	Yancey	\$13,000
2010	Creation of Old-Time Music Heritage Hall exhibit	Surry	\$23,000
2010	Start up of resource center for Junior Appalachian Musicians (JAM) programs	WNC region	\$25,000
2012	Start up of Junior Appalachian Musicians (JAM) program	Transylvania	\$8,675
2012	Enhancements to Old-Time Music Heritage Hall exhibit	Surry	\$10,820
2012	Curriculum and teacher development for Junior Appalachian Musicians programs	WNC region	\$15,000
2013	Traveling exhibits on instrument-making traditions (fiddle, banjo, guitar)	Ashe, Surry	\$25,000
2013	Expansion of Blue Ridge Music Hall of Fame exhibits	Wilkes	\$3,238
2013	Creation of traditional music venue at the historic Cowee School	Macon	\$10,697
2013	New dance floor and seating for Orchard at Altapass music hall	McDowell, Mitchell	\$6,560
2014	Back stage "green room" for music performances at Stecoah Valley Center	Graham	\$10,000
2014	Expansion of Junior Appalachian Musicians (JAM) programs	Mitchell, Yancey	\$7,035
2014	Start up of continuing education music program at Haywood Community College	Haywood	\$20,000
2014	New sound system for music performances at the Ashe Civic Center	Ashe	\$18,000
2015	Stage expansion for music performances at the Marshall Depot	Madison	\$14,150
2015	Sound and lighting upgrades for music performances at the Parkway Playhouse	Yancey	\$6,000
2015	Documentary film about master fiddler Roger Howell	Madison	\$5,000
2016	Renovations to historic barn to create dance hall for music performances	Ashe	\$10,000
2016	Sound system and exhibit additions to the Old-Time Music Heritage Hall	Surry	\$5,000
2016	Upgrades to public radio station WNCW's live performance studio	Rutherford	\$8,000
2016	Music venue improvements at Fines Creek Community Center	Haywood	\$3,950
2016	Multimedia lesson plans about WNC music traditions for 8th grade students	8 WNC counties	\$7,500
2017	Construction of outdoor stage for music events at historic Cowee School	Macon	\$6,600
2017	Portable sound system for traditional music events in Madison County	Madison	\$5,000
2017	New sound system for music performances at the Peacock Performing Arts Center	Clay	\$2,225
2017	National PBS distribution of David Holt's State of Music season 2 documentary series	WNC region	\$15,000

### 3.3.1 CASE STUDY: Blue Ridge Music Trails (BRMT)

**A major goal included in the 2010 BRNHA strategic plan was the development of at least one signature trail to foster collaboration, serve as a model of sustainability, provide tangible economic and quality of life benefits, and receive regional and statewide recognition.**

When the opportunity arose to partner with the North Carolina Arts Council on the redevelopment of the Blue Ridge Music Trails (first launched in 2003), music led the way and the retooled Blue Ridge Music Trails of North Carolina was born, becoming the 1st signature BRNHA initiative.

BRMT at its heart is a network of locations with historical significance, venues, and landmarks that celebrate unique Appalachian musical genres. It includes hundreds of musical points of interest in 29 counties across WNC, from informal jam sessions to major festivals to centers of learning. Four counties were added to the 25 county BR-NHA footprint at the request of the North Carolina Arts Council.

More than a decade in the making, BRMT is a project of the North Carolina Arts Council, BRNHA, and over 180 partner agencies, venues, promoters, museums, and artists.

*“The BRMT vision is to create an environment in Western North Carolina where the rich music traditions of the region are sustained and utilized in appropriate ways to improve the lives of residents; where traditional musicians thrive and feel supported in their creative lives; where visitors and residents alike can appreciate and enjoy the richness of the music; and where youth are provided with first hand traditional music experiences that spark interest in music.”*

- Angie Chandler  
Executive Director, BRNHA

The primary program goals are as follows:

**GOAL 1 - Economic Impact & Development Through Heritage Tourism:**

- Brand Western North Carolina (WNC) as a premier internationally renowned heritage tourism destination for traditional music (old-time music, ballad singing, bluegrass, and gospel) and to utilize the Blue Ridge Music Trails as a place-based economic development project
- Make it easy for music fans to “find the music” all year long in WNC through “free form trails”

**GOAL 2 - Build Community & Offer Promotion Tools:**

- Rally the arts and tourism communities & invest in authentic products and experiences
- Promote authentic events that build a “sense of community” where people can come to experience, learn, interpret, create, and become stewards for future generations

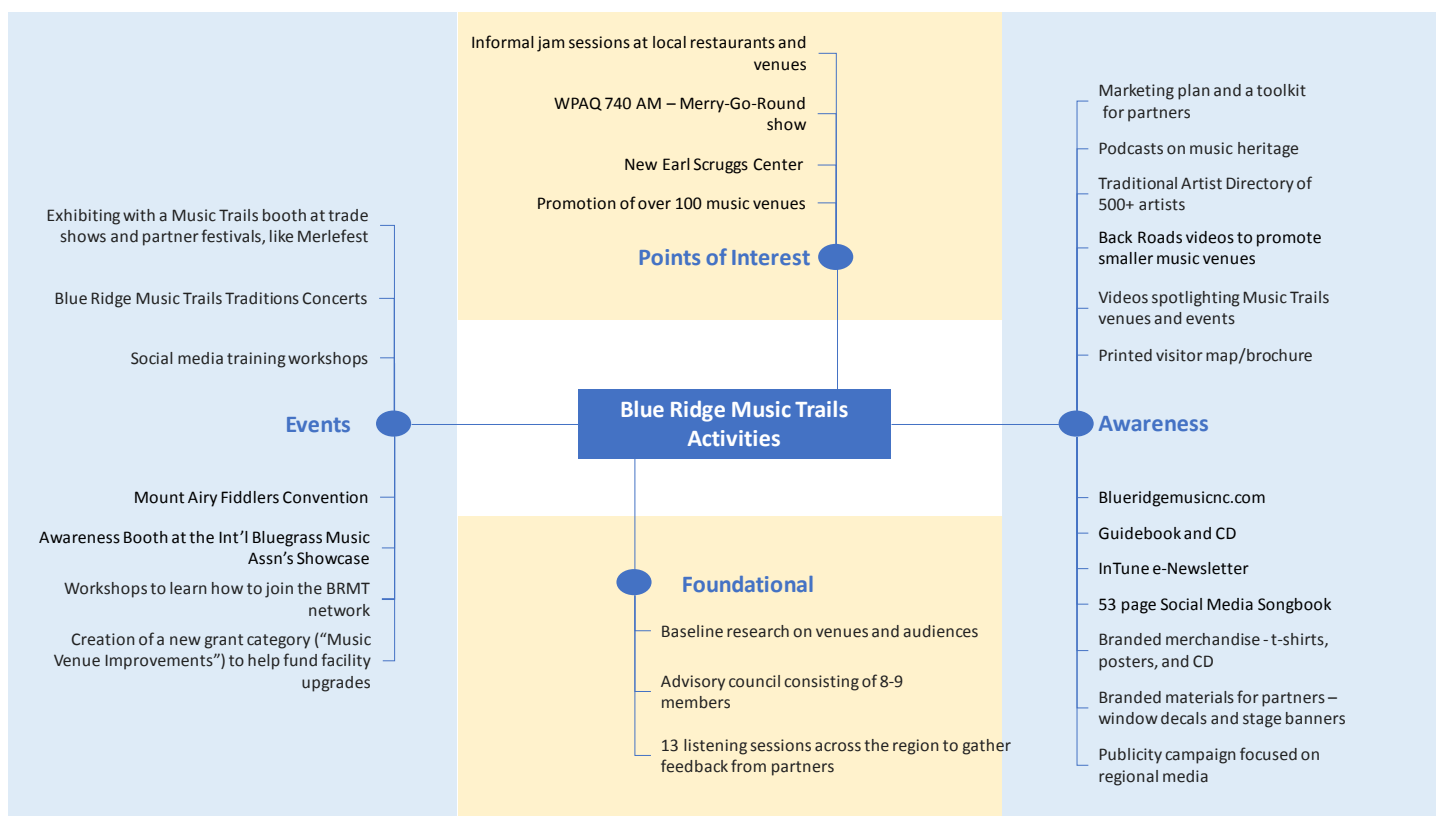
**GOAL 3 - Protect & Preserve Regional Legacy:**

- Strengthen awareness of the legacy, preserve historical assets, and foster public leadership and pride

Fiscal Year	Milestone/Accomplishment
2011	First meetings with N.C. Art Council to beginning planning for re-development of the Blue Ridge Music Trails
2012	Baseline research on venues and audiences
2012	Creation of an advisory council
2013	Convening of 13 listening sessions across the region to gather feedback from partners
2013	Brand and logo development
2013	Publication of a new Blue Ridge Music Trails guidebook and companion CD
2013	Start of ongoing exhibiting with a Music Trails booth at trade shows and partner festivals
2013	Launch of an official Blue Ridge Music Trails concert series, hosted by BRNHA
2014	Development of a marketing plan and a marketing toolkit for partners
2014	Creation of a printed visitor map/brochure
2014	Launch of a new Music Trails website with an interactive map and events calendar
2014	Development of enewsletters for visitors and partners
2014	Creation of branding materials for partners (window decals and stage banners)
2014	Development of branded merchandise - t-shirts, posters, and CD
2015	Music Trails publicity campaign focused on regional media
2016	Creation of short videos spotlighting Music Trails venues and events
2016	Surveying of partner venues and audiences at selected venues/events
2016	Creation of a social media training manual for partners and hosting of 4 social media training workshops
2017	Podcasts and radio shorts on music heritage topics in partnership with WNCW and No Depressionmagazine

**Fig 3.10 Music Trails Accomplishments by Year**

**Fig. 3.11: Blue Ridge Music Trails Activities Highlights**



### Foundational Support

- **In 2014 workshops held throughout the region helped more than 100 partners learn how to connect with and join the BRMT network**
- Hosting of four social media training workshops for 62 participants and 53 BRMT partners in Asheville, Boonville, Valdese, and Cherokee
- The creation of the 53 page Social Media Songbook for all BRMT partners which acts as a guide for engaging potential partners in WNC by building a cohesive online presence including Twitter/Instagram/Facebook by tagging the official BRMT accounts, promoting local events, raising awareness about the region’s historical musical roots, and holding ticket giveaway contests to boost visitor interest. 3,678 BRMT social media followers - #BlueRidgeMusicNC (as of 8/18/2016).
- **In its last three grant cycles ('13, '15, '17), BRNHA has directed a larger proportion of its grant funding to music heritage projects to help support the development of the Blue Ridge Music Trails of North Carolina initiative**
- BRNHA created a new grant category ("Music Venue Improvements") to help fund facility upgrades (such as sound systems, seating, lighting, and dance floors) at traditional music venues that are managed by a local government or a nonprofit organization

## Awareness:

- Published the BRMT of NC Guidebook & a 26 song CD - available for public purchase showcasing influential musicians, stories behind the music, and many authentic off the beaten path musical experiences. 5,000 books were sold – BRNHA kept profits from sales online and at shows. A reprint of the guidebook is scheduled for 2018
- Produced a standalone version of the CD and sold 952 out of 1,000 copies printed in 2016
- Built a new website: blueridgemusicnc.com that includes historical data, music lessons, interviews, maps, and a calendar of festivals, concerts, jam sessions, etc. The website had over 83,000 visits in 2015
- In 2016 website usage increased by 27% to over 106,000 visits with over 222,000 page views Launched the Music Trails e-newsletter in 2014 with a current circulation of 3,500 subscribers (2017)
- Developed *Back Roads* videos to promote smaller music venues – produced 10 videos (2014/2015) released on a promo schedule online that generated thousands of views
- Created a new t-shirt promoting the “Roots” of NC music available at Eastern National shops
- Developed short podcasts on music heritage with public radio station WNCW and *No Depression* magazine
- Participated in monthly on-air interviews promoting BRMT on Rockingham Radio (1490 WLOE)
- Delivered BRMT stage banners to over 75 partner sites
- Co-sponsored #NCMUSICDAY with the North Carolina Arts Council and State Tourism Office, generating 424,080 social media impressions through a live Periscope broadcast featuring African American music and mountain dancing
- Exhibited the BRMT project at three North Carolina Welcome Centers during National Tourism Week on an annual basis
- Staffed BRMT Booths at festivals such as:
  1. MerleFest – one of the nation’s largest and most influential “Americana” music events - held annually every April in Wilkesboro with 78,000 attendees (2015)
  2. International Bluegrass Music Association’s Showcase in Raleigh, with more than 180,000 attendees/year (since 2014)
  3. The historic Mount Airy Bluegrass and Old-Time Fiddlers Convention
  4. The National Folk Festival in Greensboro - partnered with the North Carolina Arts Council to hire local musicians

## Points of Interest:

- Promotion of over 100 music venues and events
- Participants include music venues/events in 29 counties that provide musical experiences in: ballad singing, bluegrass, blues, Cherokee music, early country music, gospel, old-time, shaped-note singing, live clogging, contra, and square dancing
- Includes points of interest like the Earl Scruggs Center, which allows visitors to play with its collection of new Deering banjos (WNC musicians are recognized as the creators of modern banjo styles)
- Includes heritage sites like the Old-Time Music Heritage Hall and radio station WPAQ 740 AM – Merry-Go-Round – the oldest live radio show of old-time, bluegrass, and gospel music
- Informal jam sessions at local restaurants and music venues are held 7 days a week throughout WNC

## Events:

- Promotion of more than 50 annual festivals/concert series
- BRNHA staff has represented BRMT at over 30 festivals reaching 6,000+ attendees (2014)
- Organized two “Traditions Concerts” in Asheville and Blowing Rock with 535 attendees as part of an annual concert series that showcases WNC’s master musicians and regional music

## BRMT Program Outcomes:

### GOAL 1 - Economic Impact & Development Through Heritage Tourism:

Since the initial phases of BRMT, the evaluation and assessment of the program's goals and outcomes have proven to be a big priority for BRNHA. A number of studies and surveys have shown tangible economic impact and development assistance for local businesses.

According to a 2013 economic impact study, visitor spending benefits for the heritage tourism sector are over \$2.4 billion annually, contributing over \$182 million to local and state government revenue and supporting 31,000 jobs.

A 2012 North Carolina Folklife Institute and East Carolina University study revealed the following:

- The 26 venues/events surveyed had a total annual economic impact of \$20.7 million
- For every 100 visitors to a venue/event, more than \$4,000 will be spent locally
- 40% of music audiences visit the region specifically for the music event

A 2016 Americans for the Arts Economic Impact Survey included polling of audiences at 11 Music Trails events. The following information has been gleaned about visitor reaction, demographics, and habits in relation to heritage tourism efforts spearheaded by BRNHA through BRMT:

- 100% of visitors surveyed said they would return to the music venue/event
- 100% of visitors surveyed said they would attend a similar event at another venue
- When visitors were asked to identify the most important source of information in deciding to attend the event, 10% said the Music Trails guidebook/brochure
- 65% surveyed said if this music event weren't happening, they would have traveled to a different community to attend a similar event
- Other activities visitors would enjoy in WNC: 58% scenic drives, 38% other music venues, art and craft galleries 34%, state and national parks 26%, farm tours 19%, Cherokee Indian sites 11%

## Attendee Demographics:

- 98% White, 1% Asian/pacific islander, 1% Hispanic
- 67% of visitors surveyed were 55+ while only 9% were under 34
- Visitors were across the map in terms of income levels - 17% made under \$40,000, 18% made over \$120,000
- 44% of visitors surveyed were from out of town, planning to spend one or more nights away from home

### GOAL 2: Build Community & Offer Promotion Tools:

According to the *Social Media Songbook: A Guide for Engaging Music Lovers in Western North Carolina & Beyond*, 72% of small business owners say their social media efforts are paying off. According to a 2015 BRMT Partner Assessment:

- 63% reported that the BRMT effort has either significantly or somewhat helped
- 82% of the respondents reported that attendance to their venue was up in 2015 vs. 2014
- Zuma Coffee in downtown Marshall hosts a Thursday night bluegrass jam with Grammy winning musicians like Bobby Hicks. The cover photo of the Music Trails guidebook was taken at the Zuma jam
- The Marshall Depot presents bluegrass and country music every Friday night, year-round. A \$14,150 grant in 2013 helped expand the stage (via a portable stage extension) so that it could present larger bands. The Depot periodically hosts performances by students from the Madison County Junior Appalachian Musicians program
- The congregation at the century-old Fletcher Feed & Seed opens their church doors every Friday and Saturday night for free coffee and free music, seeing a steady increase in crowds with even international visitors joining the locals

*"BRNHA has given our tiny town of 300 the means to host a community theater the level of Atlanta while still maintaining a coffeehouse atmosphere where you feel like you know the artists and are listening to the stories of old friends."*

- Harry Baughn  
Hayesville Mayor

Site of numerous Music Trails grants

One of the many stops along the Blue Ridge Music Trails is the historic Cowee School Music Hall in Cowee North Carolina. A \$10,696 BRNHA grant awarded in 2013 enabled the school to invest in a high quality sound system that has resulted in a popular yet intimate summer concert series averaging 125-175 attendees per show.

Stacy Guffey, the Director of the Cowee School Heritage Center, details the Cowee School Music Hall's evolution as a BRMT partner site:



Stacy Guffey at the Cowee School

*"We used to have to go to Asheville or Nashville for high quality concerts. The BRNHA music trails grant put us on the map for music, allowing our small town music hall to attract world class bluegrass, folk, and newer artists with traditional roots. When we started out, we had to call bands to play. The 2nd year bands called us. The 3rd year we had to decline bands!"*

*Bluegrass is played all over the world and now folks contact us from Canada and even Asia asking to come play at our venue - bluegrass is apparently huge in Japan! Cowee is a good in-between spot from Asheville to Alabama where bands feel a greater sense of community than in more saturated locations. People are looking for authentic experiences like our concerts. Our venue is small, intimate, and people come to enjoy the music and have a meal with community members."*

*- Stacy Guffey  
Director, Cowee School Heritage Center*

*"Honestly I grew up with 60s pop music, and hadn't heard real bluegrass - I thought Earl Scruggs was a mop or a cleaner! Keeping the doors open other than Sundays have helped both the community and our congregation, which has grown from 20 to 100 people since the Feed & Seed music venue opened in 2009. The greatest irony is that I've gotten more encouragement support and networking from the Blue Ridge National Heritage Area than from my own denomination!"*

*- Phillip Trees  
Founder & Pastor, Feed & Seed*

**GOAL 3: Protect & Preserve Regional Legacy:**

The Blue Ridge Mountains are home to numerous historic music halls and theaters. BRNHA created a new grant category (“Music Venue Improvements”) to help fund facility upgrades (e.g., sound systems, seating, lighting, and dance floors) at these traditional music venues that are managed by a local government or a nonprofit organization. Here are some examples of the outcomes of these grants:

- In rural Haywood County, the Fines Creek Community Association enhanced its historic community center as a venue for indoor and outdoor traditional music performances. The enhancements included sound baffles, electrical work, stair railing, and a new mobile-responsive website. The annual Fines Creek Bluegrass Jam festival featuring local and regional bluegrass bands, resumes in 2016
- The Surry Arts Council upgraded its sound system and exhibits at the Earle Theatre, which houses the Old-Time Music Heritage Hall in downtown Mount Airy

- The sound system enhancements have improved the presentation of hundreds of traditional music performances — the Earle Theatre is the site of the WPAQ Merry-Go-Round live radio broadcast every Saturday, the annual Tommy Jarrell Festival, and the popular new Blue Ridge and Beyond concert series
- Isothermal Community College upgraded and enhanced its Studio B, where public radio station-WNCW-FM records and broadcasts music performances by regional and traditional musicians. The sound system and acoustical improvements have helped WNCW produce higher quality shows and broadcasts
- The Parkway Playhouse in Burnsville, North Carolina upgraded its lighting and sound systems to help support more music programming. The Playhouse has been hosting RiddleFest, an annual festival celebrating the life of African-American musician Lesley Riddle, who helped shape country music in its earliest days. A \$6,000 grant given in 2015 for technology upgrades allowed the venue to host a sold out event

**DANCING MAKES A DIFFERENCE**



It's easy to learn how to dance the old-fashioned mountain way. Just ask Bill Carson, one of the founders of the Orchard at Altapass at milepost 328 on the Blue Ridge Parkway

"First, put your feet on the floor to the beat. Second, smile," Bill cracks a big grin. "And third, remember folks are only going to watch the best dancers, not you." He laughs.

With the return of warm weather, the Orchard is open on the Parkway, near Spruce Pine and Little Switzerland. The

restored country store and apple orchard is another stop on our Blue Ridge Music Trails, offering 150 free concerts of old-time music and bluegrass each season. BRNHA has funded heritage trail signage for the Orchard and has provided infrastructure grants to improve the music stage and expand the concert series.

Bill isn't bashful about asking the ladies to join him on the dance floor during concerts. He remembers, spotting two parents clapping along with their young daughter, who looked like one bored teenager. He

went over and asked her to dance. The girl came along and moved her legs a little stiffly and her arms. Bill did his soft-shoe shuffle.

But when the tune closed out and the audience was applauding, Bill saw that the parents were crying. Turns out the girl was no teenager, but a 30-year-old autistic woman. The parents were gratified that their daughter could join the fun. The family started coming most weekends for several years. Amy became an enthusiastic dancer, until the summer that she told Bill she wouldn't be returning that season.

"I'm going to a summer camp for autistic people where I'm going to be the dance instructor," she said proudly.

So don't tell Bill Carson that old-fashioned dancing doesn't make a difference. "It changes people's lives. You get a feeling of community and comfort that allows people to grow."



Bill Carson and Starli McDowell at the Orchard at Altapass

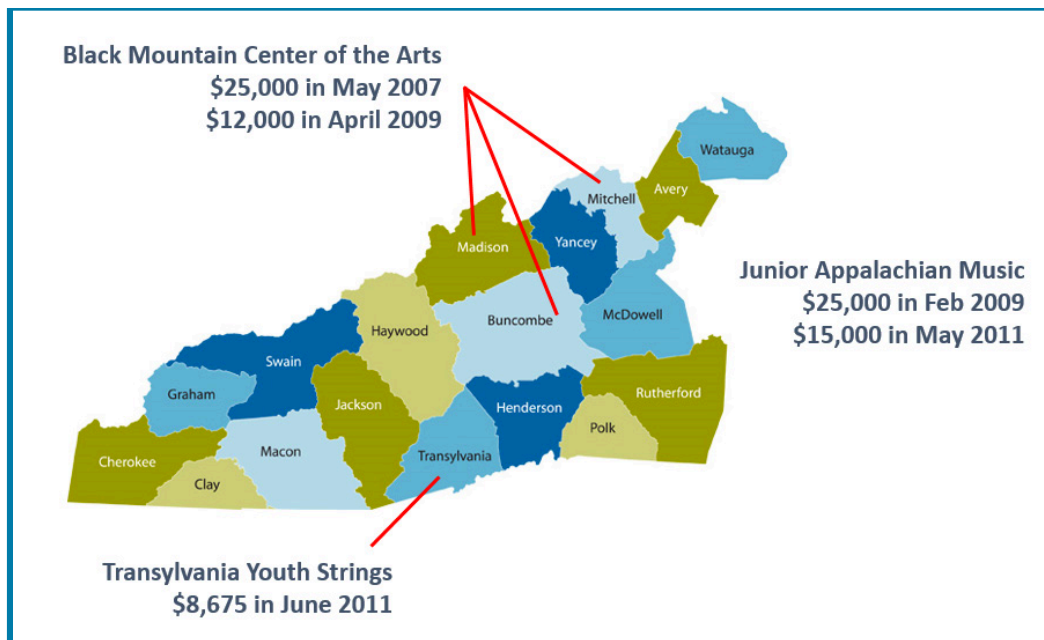
**Excerpt: Music Trails program featured in 2017 BRNHA Heritage Matters Publication**



### Case Study: Grants Supporting the Junior Appalachian Musicians Program (JAM)

The Junior Appalachian Musicians Program (JAM) program began in the year 2000 as an after-school program in Alleghany County to enable students to learn traditional music (made with instruments traditionally played in the Western North Carolina region, such as the fiddle, banjo and guitar) from musicians in the area.

**The program was so successful that arts organizations and school systems in many WNC counties sought to establish their own programs through the assistance of BRNHA grants exceeding \$85,000.**



**Fig 3.12 JAM Program Grants by County/Region**

- Two BRNHA grants in 2007 and 2009 to the Black Mountain Center for the Arts helped to launch similar programs in Buncombe, Madison, and Mitchell Counties. All three programs are going strong today
- A 2009 BRNHA grant helped establish a regional resource center – Junior Appalachian Musicians, Inc. – to help strengthen existing JAM programs and to assist start-up programs with resource materials, teacher and administrator training, and guidance on best practices. A second grant awarded in May, 2011 enabled JAM, Inc. to provide further instructor training and to develop a standard curriculum unit to introduce fourth graders in North Carolina public schools to traditional music
- In June 2011, BRNHA awarded a grant to Transylvania Youth Strings to launch a JAM program at the Transylvania Boys and Girls Club. The program served 25 students in its first year and the organizers were able to secure funding from local sponsors to sustain the program. The local Mountain Song Festival now provides a major source of funding
- With support from a \$7,035 BRNHA grant, the Toe River Arts Council expanded its Traditional Arts Program for Students (TAPS) by offering classes throughout the school year at six schools and adding banjo instruction to one location during the 2013-2014 school year. A total of 70 students enrolled in the program and 60 stayed with the program through the school year

### 3.3.2 Case Study: Grants Supporting the Junior Appalachian Musicians Program (JAM)

#### OUTCOMES:

- There have been increasing numbers of students participating in the traditional music programs, spanning the ages of 8-18
- Placing emphasis on rich local traditions fosters a sense of pride and place with those who participate, while continuing an oral tradition of storytelling through music
- **Economically disadvantaged youths who lived in areas where access to structured musical programs now have access to quality instruction and instruments**

*"Some 250 students each year benefit from the program, learning to play banjos, mandolins, fiddles and traditional instruments. The kids play for free, and we pay the instructors about \$35 an hour for their time. That's been important for the young adult musicians who teach. All the young people in the Swannanoa Valley really have to have more than one income. It's hard to live on playing traditional music."*

*- Gale Jackson  
Executive Director,  
Black Mountain Center for the Arts*

*"These are tier 1 economically disadvantaged kids - most are on free and reduced lunch. Many kids in the mountains are depressed. These are the kids who weren't fitting in - not the cheerleaders, but those struggling academically. These classes have helped these kids develop pride and a sense of place. If we don't do it, no one else will. The initial \$7,500 we were given by BRNHA has allowed us to continue this program. We are sustainable."*

*- Denise Cook  
Executive Director  
Toe Arts River Council*

*"We started with two middle schools - 20 kids. Now we have six schools - 50 kids 8-18. Third graders seem to take to it the best. This program is passing on an important oral tradition - kids are learning old time songs and instruments like mandolin, banjo, dulcimer - which is like an oblong guitar with a twang. It costs \$75-\$150 to make these cardboard instruments and we craft the covers out of old quilts. This is a way to preserve traditional mountain music that is slowly slipping away. And it's interesting to hear the kids find out their grandparents used to play these instruments. It becomes a way of linking the past and the future and giving some hope during tough times."*

*- Kate Groff  
Programs Manager  
Toe Arts River Council*

### 3.3.3 Case Study: Traditional Artists Directory

Launched in 2006, BRNHA's Traditional Artist Directory (TAD) is a guide to many of the finest traditional craft artisans, musicians, dancers, and storytellers in the North Carolina mountains and foothills. **The directory contains listings for more than 400 artists and groups as well as profiles of 100 influential historic artists.**

A new round of nominations for 100 artists is currently taking place in 2017, an expansion made possible by funding support from the North Carolina Arts Council. Two project managers have been assigned to cover the region, solicit recommendations, and prepare nominations. The directory is a work in progress, and its development takes place in phases. More artists will be added over time.

The directory can be found online at:  
[blueridgeheritage.com/traditional-artist-directory](http://blueridgeheritage.com/traditional-artist-directory)

### Artist Selection Process:

A regional panel of folklorists and cultural resource experts juries the selection process. Criteria for inclusion in the directory include artistic excellence, authenticity, and significance within a particular tradition. Highest priority is given to traditional artists who are:

- Either native to the region or who have become residents of the region and have achieved a level of artistry that is accepted by other artists in the community as accomplished
- Learned by oral tradition
- Are recognized by their community as outstanding representatives of local and/or regional culture
- Are practicing traditions handed down over generations

The North Carolina Folklife Institute led the development of the Traditional Artist Directory (TAD) for BRNHA. Project partners have included:

- The Blue Ridge National Heritage Area Partnership
- The North Carolina Arts Council
- Appalachian State University
- Mars Hill University
- The Museum of the Cherokee Indian
- The John C. Campbell Folk School
- Qualla Arts and Crafts
- Western Carolina University

### OUTCOMES:

TAD helps to preserve, interpret, and develop mountain music traditions and artists by:

- Providing a resource for event planners and educators who want to include traditional artists in their programs
- Providing an educational resource about the depth and breadth of traditional culture in the region
- Assisting traditional artists by making information available about those who are interested in participating in public programs

#### 3.3.4 Case Study: “Mountain Music in the Classroom”

Appalachian State University created multimedia lesson plans for eighth graders about North Carolina’s music traditions.

The team of professors and graduate students dubbed the project “Mountain Music in the Classroom” and created a website for the materials ([appalachiaonline.appstate.edu/mountain-music-classroom](http://appalachiaonline.appstate.edu/mountain-music-classroom))

Content was developed around the North Carolina learning goals for eighth grade social studies and history students and is presented in four thematic areas:

1. What Is Appalachia?
2. What is Appalachian Music?
3. Music Migration & Industrialization
4. Appalachian Ballads

### Music Heritage Conclusion:

**BRNHA has promoted music heritage, past, present, and future by allowing opportunities for the musicians of tomorrow to gain access to the traditional music of yesteryear, while restoring historic music halls, promoting traditional music artists through an online directory, and branding the region as a global music tourism hub.**

Through compiling data, research, site visits, and in-depth interviews, the ARCBridge team has witnessed firsthand that BRNHA has had a significant impact on hundreds of local communities, artists, schools, and venues through the preservation, interpretation, and development of its music heritage programs. One particularly rewarding result has been the opportunities that BRNHA grants have afforded young economically disadvantaged schoolchildren in rural areas how to play the instruments of their grandparents generation. This allows future generations to preserve and interpret the past, while gaining a renewed sense of community pride during financial hardship.

The BRMT has become BRNHA's signature activity in the region. In compiling hundreds of individual points of musical heritage - from concert halls to museums to weekly jam sessions where visitors and college student tour groups can play alongside Grammy winning fiddlers like Bobby Hicks - BRNHA has created a centralized resource for music heritage tourism in the region. This has allowed many partners the opportunity to share their own more localized music traditions and garner national and even international recognition. BRNHA is working on increasing tourism opportunities further by offering future guided tours for music lovers visiting the region.



Penland School of Crafts Gallery

### 3.4 Craft Heritage

Building on age-old craft traditions of Cherokee, European, and African American cultures, the North Carolina mountains have become the country's center for hand-made crafts. Area artisans and associated organizations, according to a 2008 study, generate \$206 million in annual economic impact. **BRNHA has assisted in the further development of prestigious and historical educational institutions like the Penland School of Crafts and The Southern Highland Crafts Guild and has offered business classes and strategies to local entrepreneurs.**

**BRNHA has supported craft heritage preservation, interpretation, and development efforts by providing 41 grants since 2005, roughly 27% of the total 154 grants. \$448,375, or 21% of total federal funding allotted to grants was spent on projects promoting craft heritage including:**

- Supported the marketing of the Graham County Barn Quilt Trail (2011)
- Partnered with the North Carolina Department of Cultural Resources on a statewide workshop program to teach rural arts and culture non-profits on how to build partnerships (2011)
- Center for Craft, Creativity, and Design – developed and printed brochures highlighting the EnergyX-change and Jackson County Green Energy Park as national models for sustainable production of craft (2012)
- Supported the Asheville Art Museum in staging a 6 month exhibition of Appalachian, Cherokee, and Low Country Baskets, reaching an audience of 19,000 visitors (2012)
- Aided in development of the Quilt Trails of WNC in Madison, Ashe, Yancey, Mitchell, Avery, and Watauga counties which featured hundreds of painted quilt patterns adorning barns and selected buildings in small communities throughout the region
- Co-sponsored production of a brochure promoting visitation to craft festivals and activities in WNC during American Craft Week

- Supported the Qualla Arts and Crafts Mutual in Cherokee, which represents 300+ artists who create baskets, pottery, woodcarving, beadwork, jewelry, masks, dolls, and traditional Cherokee art.
- BRNHA provided grants for a series of business and marketing classes offered by HandMade in America to local craft entrepreneurs. BRNHA grants to HandMade in America have been redistributed to many small towns and to projects that have promoted the craft industry in WNC.
- With BRNHA grant funding, the Asheville Art Museum in partnership with the Southern Highland Craft Guild presented an exhibit Feb-June 2016 showcasing the leading role of women in the Craft Revival and beyond, drawing 4,000 visitors.

While BRNHA conducted its craft activities mainly through grants awarded to partner organization HandMade in America, the dissolution of that nonprofit has left a wide void in the region that the BRNHA is planning to fill. New grant money is enabling BRNHA to create a signature Crafts Trail, a new initiative which began in March 2017.

### 3.4.1 Case Study: Crafts Trail

#### Branding WNC as an International Center for Crafts

**The new Crafts Trail is the latest signature initiative by the BRNHA, with the goal of creating an online public portal consolidating information about artisans and galleries across the 25 county region to boost crafts tourism, visibility, and economic impact.**

The first phase of the Craft Trails development is being funded by three grants:

- \$90,000 grant from the Appalachian Regional Commission
- \$25,000 grant from the Community Foundation of Western North Carolina
- \$5,000 grant from the North Carolina Arts Council.

*Craft schools like the Penland School of Crafts contribute nearly \$12 million each year to the local economy. Craft nonprofits, like the Southern Highland Craft Guild in Asheville, gross \$4.4 million and 2,200 individual artists have an annual economic impact of \$86.2 million.*

*- Study conducted by  
DESS Business Research in 2008*

Development activities thus far have included:

- A kick-off meeting to publicize the effort
- An advisory council meeting
- 7 listening sessions completed with artists, arts councils, and tourism partners around the region. This feedback will be used to select an initial 75 galleries, craft schools, and studios to feature online. The Southern Highland Craft Guild is one of six partners providing meeting space and support
- April 2017 press event that resulted in articles raising awareness about the region's craft heritage, including in *Mountain Xpress* and *USA Today*.

BRNHA expects to launch the Craft Trails web module by the end of FY18. It will be housed on a revamped BRNHA website. The entire digital crafts trail initiative is slated to be completed in the next 3-5 years, with the end goal to not only increase economic development opportunities for individual artists and galleries, but to make the WNC region known as an international center for crafts.

*"The biggest impediment for small businesses is educating the public on their work and what they do. The Craft Trails are a collective opportunity to increase the visibility of all regional crafters and artisans."*

*-Angie Chandler  
Executive Director, BRNHA*

*“Having BRNHA come back in this big visible way will be very helpful to the artisans. The Craft Trails will help increase our visibility and we will get press.”*

*- Mary Carol Koester  
Local Artisan Bookmaker*

*“BRNHA is unique - they are the only organization that is attempting this complex Craft Trails initiative and uniting this area. We don’t have the resources to do that.”*

*- Tom Bailey  
Executive Director, Southern Highland Craft Guild*

Fiscal Year	Project	Counties Served	Dollars Awarded/ Expended
2005	Renovation design for Penland Gallery and Visitor Center	Mitchell	\$20,000
2006	Renovations to historic Crossnore Weaving Gallery	Avery	\$15,313
2006	Craft product catalog for Home of the Perfect Christmas Tree gallery	Mitchell	\$15,000
2006	Marketing of Grove Arcade ARTS & Heritage Gallery	Buncombe	\$30,750
2007	Renovations to Penland Gallery and Visitor Center	Mitchell	\$20,000
2007	Launch of Quilt Trails in four counties	Ashe, Madison, Mitchell, Yancey	\$38,000
2007	Creation of online Traditional Artist Directory	WNC region	\$30,580
2007	Expansion of Home of the Perfect Christmas Tree gallery	Mitchell	\$25,000
2008	Creation of Tryon Arts & Crafts heritage gallery	Polk	\$20,000
2008	Kiln shed for Southwestern Community College pottery program	Swain	\$23,000
2008	Economic impact study of professional crafts industry	WNC region	\$10,000
2008	Creation of Watauga County Quilt Trail	Watauga	\$11,350
2009	Local pottery curriculum for Western Piedmont Community College	Burke	\$10,420
2009	Renovations for crafts room at Historic Johnson Farm	Henderson	\$22,200
2009	Southern craft exhibit at Asheville Art Museum	Buncombe	\$6,500
2011	Craft classes and workshops at Stecoah Cultural Arts Center	Graham	\$5,500
2011	Asheville Art Museum exhibit of Appalachian and Cherokee baskets	Buncombe, Jackson, Swain	\$5,000
2012	Pottery tradition research and pottery trail brochure	six WNC counties	\$24,998
2012	Blacksmithing residencies at UNC-Asheville crafts program	Buncombe	\$9,453
2012	Brochure and website for Graham County Quilt Trail	Graham	\$3,455
2012	Craft entrepreneurship workshops	WNC region	\$6,000
2013	Luthier’s Craft exhibits (fiddle, banjo, guitar)	Surry, Ashe	\$25,000
2013	Craft entrepreneurship workshops	WNC region	\$6,000
2015	Craft heritage exhibit at Penland Gallery and Visitor Center	Mitchell	\$10,000
2016	Architectural plans for craft school at Mayland Community College	Avery, Mitchell, Yancey	\$15,000
2016	Interpretive wayside exhibits at 6 craft heritage sites	Cherokee, Haywood, Jackson, Watauga	\$13,200

**Fig. 3.13 Examples of Craft Heritage Projects**



Penland School of Crafts Gallery

### 3.4.2 Case Study: Penland School of Crafts Renovations

Founded in 1929 by teacher Lucy Morgan, the Penland School of Crafts is a world renowned center for contemporary craft education and preservation located high in the Blue Ridge Mountains. The school offers 1, 2, and 8 week workshops to students of all ages and serves as a hub for the dozens of craft galleries located in nearby communities.

BRNHA has been instrumental in the development of the Penland Gallery and Visitors Center, which is described on the Penland website to be *“one of the finest showcases for contemporary craft in the Southeast attracting thousands of visitors each year”*. Works by more than 500 current and former Penland instructors, resident artists, and former students around the world are on display and for sale.

Over the span of a decade, BRNHA has given 3 grants totaling \$50,000 to the Penland School of Crafts:

- A 2005 BRNHA grant of \$20,000 funded architectural design work for renovations to the Penland Gallery and Visitors Center
- A 2006 BRNHA grant of \$20,000 supported the renovation work.
- A 2015 BRNHA grant of \$10,000 was used to create an interpretive exhibit in the Visitor’s Center spotlighting the school’s evolution from a traditional weaving program into a hallmark for traditional and contemporary craft

*“The Gallery is now the gateway for our school. The renovations made possible by BRNHA have given a public face for the school, giving us the opportunity to make Penland a tourism destination and raise awareness about our arts, workshops, and support regional craftsmanship.”*

*- Kathryn Gremley  
Penland Gallery Manager*

*“BRNHA has been a great supporter and partner for more than a decade. We get a strong sense that the organization wants to help bring people to our region and educate them. BRNHA has helped us preserve our craft heritage history but also take it to the next level with a contemporary cutting edge spin through many projects, including new kiosks.”*

*- Jean McLaughlin  
Executive Director  
Penland School of Crafts*

### 3.4.3 Case Study: Promotion of Craft Entrepreneurship in Western North Carolina

Under a \$24,000 BRNHA grant to major partner, Hand-Made in America, business and marketing training resources were made available to local artisans to help develop craft entrepreneurship and economic development in the region. Efforts included:

- Providing craft artists with professional development training and advice
- Offering entrepreneurship programming in Western North Carolina
- Offering an online craft registry
- Creating business incubator projects focused on retail, wholesale, and export activities
- Focusing on economic development in small towns

#### Southern Highland Crafts Guild

- Founded in 1930 to market mountain crafts
- NPS Partner for over 50 years
- Hosts one of the world’s largest collections of Appalachian Craft
- 2nd oldest crafts organization in the US
- Exclusive network of 900 juried artisans
- Only 10% of applicants are accepted
- Artists from nine states, Maryland to Alabama
- Six retail shops & two annual expositions
- HQ at the Folk Arts Center off the Blue Ridge Parkway



### Craft Entrepreneur Profile



#### 'Mary Carol Koester- Bookmaker/Bindery

*"I had to take an early retirement so I began training as a local bookbinder for 10 years. I had learned about the Vanderbilts, how Mrs. Vanderbilt helped local craftsmen to get on the railroad to New York City. I realized this region was full of craft heritage locations even a century ago and wanted to be a part of its future. After my apprenticeship I was juried into the Southern Highland Craft Guild, one of the most prestigious in the country.*

*This gave me the ability to sell in the Guild shops, which was a huge start, but I was totally unprepared. The recession hit big here and everyone is a business owner, so we were all in trouble. My biggest regret became that I had spent a decade learning my craft, but I hadn't learned any business skills. You really need someone to show you the ropes.*

*For me the craft entrepreneurship programs funded by BRNHA were like a mini-masters degree. I took four years of classes, held on evenings once a month, for \$20 a year. I learned how to use Facebook to market myself, how to set up a booth, formulas for pricing, and how to create a unique connection with every buyer. Now I have an operational business with a 21 page business plan and a marketing strategy. I'm even going to Charleston to market! I used to have four journals, now I have six lines selling over 40 products, with hundreds of sales annually. The economic impact for me has been 10 fold."*

### Craft Entrepreneur Profile



#### Amy Brandenburg - Jewelry Designer

*"I had heard that if you wanted to move to Asheville, you better bring your own job. The market is over-saturated with struggling artists, over 8,000 in this region. So for many people, this is often a side gig. But for me, this was what I wanted to do. Honestly, I couldn't support myself for the first few years and it took me three tries to get accepted into the Southern Highland Craft Guild. But there was an artistic ecosystem and history here in the River Arts District that inspired me to keep going. The BRNHA entrepreneurship programs were a major turning point for me in developing a viable sustainable business and learn about marketing and branding.*

*I realized I could incorporate my interest in the local heritage into my 1900's precious metal and clay silver jewelry, which in turn has made my work more marketable and stand out from the crowd in shows around the country. People really want to buy authentic crafts that have a sense of time and place. I sell at a lot of festivals like Asheville Art in the Park. I used to make \$400-\$500 a day and now I average \$1300. So instead of just paying my bills and supporting my family, I've gotten to the point where it's allowed me to triple my income. I've seen my work improve, my presentation skills, sales. And most importantly I now know how to tell a story.*

### Craft Conclusion:

BRNHA has focused heavily on the further preservation, interpretation, and development of the strong crafts culture of the North Carolina mountains and foothills—by partnering with major historic institutions and providing economic training for current artisans. The new Craft Trail, a signature BRNHA project, appears to be a promising initiative to promote crafts education and awareness amongst the greater public, as well as offer economic development opportunities for local galleries and artists.

Through site visits and interviews within the WNC crafting community, ARCBridge has learned that the new Craft Trails have really originated from a grassroots community need. Many partners like The Southern Highland Crafts Guild revealed to ARCBridge their firm belief that BRNHA is unique in its position as the only organization who could spearhead this complex digital Craft Trail initiative and connect craftspeople from 25 counties to a larger audience. This is largely due to the trust BRNHA has attained and its resources, which other community groups simply do not have access to.

It is interesting to note that the Craft Trails is mainly an online initiative, whereas the BRMT included the printing and selling of physical guidebooks and brochures. The online Traditional Artists Directory (TAD) also overlaps to feature crafts artisans. **Through the collection of data, research, site visits, and in depth interviews, the ARCBridge team has found BRNHA’s investment specifically in craft development to be very strong.**

Although there are no specialized studies or surveys highlighting the statistical impact of specific BRNHA activities, speaking one on one with local artisans aided immensely to put a personal face on the effects of the larger push for economic development, especially as it occurred during a period of recession.

**The biggest takeaway was that the local artisan community has felt an incredible void since the demise of Hand Made in America, and members sincerely wish to see BRNHA take up the mantle as the region’s leading advocate for empowering individual artisans with the business tools and guidance to grow their businesses and become financially stable.**

*"The trend has been that we have seen older artists stay while younger artists are leaving North Carolina in droves for better markets. The craft labs have helped shore up the skills of the artists. We want this to be a place where young artists are successful. BRNHA helped us get started on a lot of projects, planting the seed, and then we were able to become sustainable by getting continued funding elsewhere. Before our goal was just arts education, now we are branching into economic development and garnering tourism visitors to our towns."*

*-Denise Cook  
Executive Director, Toe River Arts Council*

*"BRNHA has been looking for opportunities to focus attention on arts and culture in our mountains - they're in the best position to connect craftspeople from 25 counties to a larger audience."*

*- Tom Bailey  
Executive Director,  
Southern Highland Craft Guild*



*Cherokee Preservation Foundation Office*

### 3.5 Cherokee Heritage

The Blue Ridge Mountains have been home to the Eastern Band of Cherokee Indians, once the largest of all Southern tribes, for thousands of years. Today the town of Cherokee, located on the Qualla Boundary Cherokee Indian land, serves as the cultural center for a thriving population of Cherokee citizens. There are over 14,000 enrolled members of the Eastern Band of Cherokee Indians (EBCI) residing in this region (Source: EBCI website).

**ARCBridge notes that BRNHA has shown significant interest in preserving and promoting local Cherokee history and traditions through the development of partnerships with key Cherokee organizations, educational grants, and building interpretative signage and exhibits. A seat on the nine member BRNHA board is reserved for a member of the Eastern Band of Cherokee Indians in order to best represent the community.**

Of the \$2,123,579 federal funding dollars allotted to grant giving, \$218,506, or 10%, were allocated to grants involving Cherokee heritage. Of the total 154 grants awarded since 2005, 25, or 15%, have focused on Cherokee preservation, interpretation, or development including the following:

## Activities

- Creation of a Cherokee homestead exhibit and Winter House in Hayesville which draws 700 student visits annually
- Digital media showcasing Cherokee crafts and traditions by the Mountain Heritage Center at Western Carolina University (2010)
- Grant support for Asheville Art Museum's staged 6 month exhibition of Appalachian, Cherokee, and Low Country Baskets which reached an audience of 19,000 visitors (2012)
- Helped establish an annual Cherokee Heritage Festival at Nelson Heritage Park which had more than 500 people, 60% out-of-towners (2012)
- Construction of a Cherokee themed outdoor classroom next to a high school in Graham county (2015)
- A \$10,000 grant revitalized the Rivercane Walk at the John C. Campbell Folk School where visitors can walk through the replanted cane that was crucial to Cherokee life and view interpretive panels that paint the local scene on the eve of the first day of the Trail of Tears in 1838.
- Creating signage interpretation in Cowee includes the first Cherokee language signs outside of the Cherokee reservation.

### Cherokee Sites within Cherokee, NC:

- Museum of the Cherokee Indian
- Oconaluftee Indian Village living history exhibit
- The *Unto These Hills* outdoor drama show

### Sites outside Cherokee supported by BRNHA:

- Cherokee Homestead Exhibit
- Clay County Historical and Arts Museum
- Junaluska Museum in Robbinsville
- Cherokee County Historical Museum in Murphy
- Nikwasi Mound – last remnants of a Cherokee town on the banks of the Little Tennessee River

Fiscal Year	Project	Counties Served	Dollars Awarded/Expended
2005	Cherokee Heritage Trail interpretive signs and exhibits	Cherokee, Clay, Macon	\$39,000
2005	Tour guide training for Cherokee heritage sites	Qualla Boundary	\$5,000
2005	Completion of heritage development plan for Qualla Boundary	Qualla Boundary	no direct expenditures
2007	Creation of online Traditional Artist Directory	WNC region	\$30,580
2009	Cherokee artifact exhibit at Rural Life Museum	Madison	\$25,399
2009	Cherokee visitor research study	7 far west counties	\$26,000
2009	Outdoor Cherokee winter house exhibit in Hayesville	Clay	\$12,500
2010	Cherokee entrance signs for Cowee National Historic District	Macon	\$7,000
2011	Videos profiling Cherokee artists and art traditions	Qualla Boundary, Jackson	\$5,627
2011	Appalachian and Cherokee basketry exhibit	Buncombe, Jackson, Swain	\$5,000
2012	Pottery tradition research and pottery trail brochure	7 far west counties	\$24,998
2012	Curriculum materials for Cherokee Homestead Exhibit	Clay	\$3,525
2014	Documentation of contemporary Cherokee art	Buncombe, Jackson, Swain	\$18,000
2015	Promotion of group tours to Cherokee	Qualla Boundary	\$29,592
2015	Construction of outdoor Cherokee-themed classroom	Graham	\$13,050
2016	NC Trail of Tears website and brochure	6 far west counties	\$5,000
2016	Tour guide training for Cherokee Heritage Trail	8 western counties	\$10,000
2016	Renovations to interpretive Rivercane Walk in Brasstown	Cherokee	\$10,000
2016	Interpretive wayside exhibits at 8 Cherokee heritage sites	4 far western counties	\$17,600

Fig. 3.14 Examples of Cherokee Heritage Projects

### 3.5.1 Case Study: Supporting Development of National Historic Trail of Tears

Following the 1830 Indian Removal Act, the Cherokee Indians fought all the way to the U.S. Supreme Court for the right to remain on their homelands in the Southern Appalachians. But more than 16,000 Cherokee Indian people from North Carolina, Tennessee, Alabama, South Carolina, and Georgia were forcibly removed along the Trail of Tears between 1837-1839, thousands perishing along the way. A portion of the tribe hid out in the mountains of WNC or laid claim to private reservations. Those survivors would become the Eastern Band of Cherokee Indians (EBCI), largely based on the Qualla Boundary between Swain and Graham counties.

In 1987, Congress designated the Trail of Tears as a National Historic Trail which currently runs through nine states including Alabama, Arkansas, Georgia, Illinois, Kentucky, Missouri, North Carolina, Oklahoma, and Tennessee. The North Carolina section of the Trail has been one of the last to be documented.

BRNHA awarded a \$5,000 grant to the North Carolina Chapter of the Trail of Tears Association to assist with these efforts, including the development of the North Carolina Trail of Tears website ([nctrailoftears.org](http://nctrailoftears.org)) and a visitor brochure showcasing 10 Cherokee Trail of Tears interpretive sites in six far-western counties. The website and brochure complement a set of 10 wayside exhibits installed in 2016.

*“A lot of people don’t realize that North Carolina was part of the Removal. We have some pristine trail segments and a part that still exists in the National Forest while other parts run through private property. Whether you’re Cherokee or not, you want to know the history of how this land became North Carolina.”*

*-Sue Abram  
President,*

*N.C. Chapter of the Trail of Tears Association*

### 3.5.2 Case Study: Museum of the Cherokee Indian Partnership

Another major program partner has been the Museum of the Cherokee Indian, which has benefited from BRNHA’s national scope, networking opportunities, and marketing support:

#### Barbara Duncan, Education Director and Cherokee Guides Educator Museum of the Cherokee Indian



*“We partnered with BRNHA because we wanted to bring more public awareness of the Cherokee land. There’s not a lot of authentic Cherokee projects on the ground. BRNHA has taken these efforts from a state to national level. BRNHA has helped us with more group tours - they have a marketing person who focuses on marketing group tours. Their website now links to our website. Our Cherokee Artist Directory has folded into the BRNHA Traditional Artist Directory. We get calls every week - do you know a Cherokee storyteller? And we refer those inquires to BRNHA. There are many networking opportunities as well - we go to BRNHA’s annual meeting and meet like-minded groups. This also allows us to connect to smaller museums. Essentially their role is that they bring in national attention, broader attention. The added tourism allows local Cherokee traditions to continue - we have over 250 artisans at the co-op.”*

### 3.5.3 Case Study: Cherokee Preservation Foundation Partnership

BRNHA works closely with one of its biggest partners, the Cherokee Preservation Foundation (CPF), on many levels, including receiving grants from the CPF for business training and development, the most recent of which is a \$20,000 fundraising grant.

BRNHA and the Cherokee Preservation Foundation entered a cultural and economic development partnership in 2005 that began with information gathering and now has transitioned into capacity building. With CPF support, BRNHA has collected tourism data for the Cherokee reservation (which is without an official census), created signage interpretation, and helped develop and promote heritage tours led by Cherokee guides.

*"In 2017, the museum has 97 groups, an increase of 20 groups since 2016. The improvements in service and guide support training have contributed toward a better experience for group leaders and tour planners as well as general visitors."*

*- Dawn Arneach  
Membership Director,  
Museum of the Cherokee Indian*

#### **Bobby Raines, Cherokee Preservation Foundation Executive Director & BRNHA Board Member:**



*"There is an incredibly mutually beneficial relationship between BRNHA and CPF. Our goal is to assist BRNHA in creating sustainability beyond federal funding through capacity building grants and fundraising. Just like we have seen funders walk away from our community because we have gaming funds, funders are also unlikely to be willing to fund BRNHA because they already get federal money. We want to help them combat that stigma and open up new opportunities."*

*Likewise, BRNHA is the answer to preserving our culture and capacity building through seeding new ideas, both within the local Cherokee community and reaching the greater population at large. Our tribes can offer the world sustainable environmental processes like traditional ramp harvesting, which we have a long traditional history of implementing. There is also a fusion between Cherokee ways, early settler ways, and African ways - in our music, crafts, etc. The Cherokee have a world view, mountain folks have a world view - our commonality is the sense of place. When you link data to heritage - it's what makes the place unique."*

### 3.5.4 Case Study: Cherokee Tour Guide Program

The Cherokee Tour Guide Program was established by two separate BRNHA grants over the span of a decade. The grants, totaling \$5,000 (2005) and \$10,000 (2015) were awarded for the purpose of stimulating economic development opportunities for the Cherokee community while allowing a means to preserve and interpret customs and traditions through living history education being passed to tribal members.

Nearly two dozen guides participated, learning traditions through lectures with the Museum of Cherokee Indian Education Director Barbara Duncan as well as through discussions with Cherokee elders. The curriculum was designed to allow Cherokee guides enough information to lead not just 1 hour museum tours, but week long expeditions across hundreds of miles of historic landmarks.

#### 2005:

- \$5,000 was awarded for training guides. This covered stipends, food, travel, honorariums
- Nine guides ranging in age from 18-50 participated, all members of the Eastern Band of Cherokee Indians
- 11 days of training:
  - 1 at the Museum of the Cherokee Indian
  - 1 at the Cherokee Preservation Foundation
  - 9 traveling through the sites
- More than 100 Cherokee heritage sites included in the training program
- Guides took an exit test of Cherokee history and culture and gave an oral presentation
- Offered educational opportunities for the public and employment opportunities to Cherokee members

#### 2015:

- \$10,000 for training 12 guides
- New historic data from PhD. trainers was included
- New Trail of Tears signs and sites were visited
- Guides were promoted through the Cherokee museum
- The public can also directly book online via Cherokee-HeritageTrails.com
- The *Asheville Citizen Times* featured a front page article on the BRNHA grant

#### Outcomes:

It was helpful to Cherokee participants to learn about their history. There has been a large increase in bus tours to the museum, where many of these guides work and assist visitors.

On a site visit to the museum, scholar Barbara Duncan and Tonya Carroll, Cherokee Tour Guide and Department Manager at the Ray Kinsland Institute, revealed that the program's economic development results were disappointing.

**However, an interesting outcome of the program as described by tour guide Tonya Carroll, was that it allowed a new generation of Cherokee the opportunity to become immersed in a comprehensive and deep look into their own culture, history, and traditions. This gave local Cherokee a sense of pride and the opportunity to spread this knowledge with their friends and family.**

*"It was a very moving experience for me. I have been asked to speak at 10 events over the past two years and I hope to share my knowledge further through my role on the Cherokee Youth Council. We have over 30 members and I have told them about my training, and they tell their families. Although the economic impact is not as strong as hoped, our education is allowing Cherokee people from all over the country to reconnect with their heritage. The Cherokee Nation in Oklahoma even sent youth members to take the Cherokee tours as a sort of pilgrimage - this is their original homeland."*

- Tonya Carroll  
Cherokee Tour Guide,  
Former Miss Cherokee

*"BRNHA assists the community in the common mission of preserving and promoting authentic Cherokee culture and history, rather than a Hollywoodized version. Many Cherokee youth have fallen into depression because of this lack of identity and cultural pride which BRNHA has assisted with in the form of the Cherokee Tour Guide Program grants."*

- Bobby Raines  
Executive Director, CPF

*BRNHA introduced us to the Cherokee and gave us standing to work together with them, otherwise we never would have forged this partnership off the reservation."*

*-Bill Carson  
Co-Owner, Orchard at Altapass*

### Cherokee Conclusion:

BRNHA has made strides in fostering strong relationships with the Eastern Band of Cherokee Indians community including partnerships to preserve and interpret Cherokee culture with the North Carolina Trail of Tears Association, the Cherokee Preservation Foundation, the Museum of the Cherokee, as well as educating tribe members from other parts of the country.

BRNHA has also served as a connector for organizations outside of the Cherokee Reservation to preserve and interpret Cherokee heritage across Western North Carolina, including the building of an outdoor exhibit in Hayesville N.C., Cherokee language signage and street signs in Cowee N.C., and the interpretation of ancient Cherokee artifacts at the Orchard at Altapass.

While BRNHA provided economic development opportunities to Cherokee tour guides, an interesting outcome of these efforts was the revelation that the extensive curriculum created a moving experience for many in the community. This BRNHA program has allowed Cherokee members from around the country the ability to reconnect with their heritage, with the Cherokee Nation of Oklahoma even sending its youth to the region for a pilgrimage.

With these findings, ARCBridge believes there is an opportunity to provide more concentrated efforts to assist depressed Cherokee youth and Cherokee artisans that should be considered in future activity planning.



**Tonya Carroll (L) and Barbara Duncan (R) outside the Museum of the Cherokee in Cherokee N.C.**



### 3.6 Agricultural Heritage

Mountainous terrain and the mix of Cherokee, European, and African American cultures create distinct agricultural traditions in the Blue Ridge region, reflected today in historic farm sites and working farms, vineyards, and orchards.

**BRNHA has attempted to preserve, interpret, and develop these heritage resources through 31 grants since 2005, roughly 20% of the total 154 grants. 15% of the \$2.123,579 in federal funding has been spent on agricultural heritage projects, totaling \$322,923.**

#### Projects include:

- Appalachian Sustainable Agricultural Project – BRNHA grant helped to support family farmers, expand farm tourism, develop new farmers markets, provide educational programs for new and experienced farmers, and create the popular Asheville City Farmers Market (2012)
- Through grants to HandMade in America and Graham County Cooperative Extension, BRNHA helped establish Appalachian Quilt Trails in five counties
- The majority of Quilt Trails sites are barns and scenic farmland and are an integral part of the Quilt Trails experience
- ASAP Local Food Guide, Annual Farm Tour, and Annual Business of Farming conferences
- Public awareness campaign by the Blue Ridge Forever land conservancy consortium (2010)
- Boarding house renovations at Historic Johnson Farm in Henderson County (2010)
- Grants support for the repair and stabilization of a century old barn at the Historic Carson House in McDowell County (2010). Rehabilitation of Historic Carson House Barn (2011 grant) provided space for a new 19th century Farm Life exhibit
- Grants awarded to the historic 100 year old Orchard at Altapass

#### 3.6.1 Case Study: Appalachian Barn Alliance

To promote the preservation of historic barns, a \$7,000 grant was awarded in 2016 to document local barns. The Appalachian Barn Alliance created an archive and a self-guided driving tour of 10 historic barns in the Walnut Township of Madison County.

With the help of a paid researcher, the all-volunteer organization produced oral histories, architectural drawings, photography, and a visitor brochure (1,000 copies printed). Two subsequent printings were made.

#### Activities and outcomes included:

- 12 historic barns featured on [appalacianbarns.org](http://appalacianbarns.org)
- Increased paying membership by 30% from the prior year
- Received a \$1,000 level contribution from a local business
- Completed documentation for the fourth of 11 townships
- BRNHA logo was featured on all brochures, websites, and press articles

#### 3.6.2 Case Study: Mitchell High School Working Farm Education Program

To promote the preservation and development of the mountain tradition of farming, an \$18,000 grant was awarded in 2014 to launch a working school farm. High school age students were educated about local agribusiness trends and sustainable practices.

#### Activities and outcomes included:

- Building a greenhouse and a barn
- Raising meat rabbits and selling meat to restaurants
- Raising Dominique laying chickens and selling the eggs
- Growing and selling hydroponic lettuce, bedding, and vegetable plants
- Raising Berkshire hogs

**Out of a student population of 504, 110 students, or 21% of the school, signed up to take the agricultural classes in 2014. In 2015, 160 students, or 31% of the school, signed up to take the classes, showing a 10% increase in participation. The BRNHA logo was printed on all school posters and websites supporting the school farm.**

### 3.6.3 Case Study: Appalachian Sustainable Agriculture Project

To strengthen and develop farm and food tourism in the region, a \$17,850 grant was awarded for a one year program in 2011 to promote public tours and awareness. A key mission was also to provide farmers and landowners with the resources and tools to understand options for leasing and transitioning farms through workshops, assistance in marketing, business planning, and risk management.

Activities and outcomes included:

- Marketing boost for regional tailgate markets and the creation of the Asheville City Market, a farmers market that is very popular today
- Developing farm itineraries for Local Food Trip Planner including ASAP Family Farm tours, U-Pick tour, Cheese Tour and a Wine and vineyard tour
- Conducting outreach through partners and media outlets, Facebook, Twitter, local food blogs. AVL Eats website, Asheville Eat & Drink
- Supporting printing of Local Food Guide
- Conducting family farm tours in 2011—1,771 people participated in 6,449 visits to 21 farms
- Conducting farm tourism workshops

- With support from a \$6,560 BRNHA grant (awarded in 2013), the Altapass Foundation enhanced the music hall at the Historic Orchard at Altapass enabling more school groups and Blue Ridge Parkway visitors during peak season.
- BRNHA provided an additional grant of \$8,850 (awarded in 2011). The Altapass Foundation developed signs and trail maps for the Historic Altapass Orchard, adjacent to the Blue Ridge Parkway. The walking trails received an enthusiastic response from local schools and visiting families

### 3.6.4 Case Study: Orchard at Altapass

The 100 year old Orchard at Altapass is a site located high in the Blue Ridge Mountains near the town of Little Switzerland, and the recipient of multiple preservation, interpretation, and development grants from BRNHA. Beating out real estate developers hoping to convert the 280 acres into 140 lots above the Blue Ridge Parkway, local resident Bill Carson and his sister, Kit, purchased the land for roughly \$1,000 an acre in 1993. The family also bought and sold the surrounding land to the Conservation Trust for North Carolina, which donated that land to the Blue Ridge Parkway. Carson soon discovered a personal connection to the orchard, which inspired him to turn it into a non-profit and seek assistance from BRNHA.

Fiscal Year	Project	Counties Served	Dollars Awarded/ Expended
2005	Agri-tourism interpretation manual	WNC region	\$10,000
2006	Creation of Quilt Trails on barns and other heritage sites	Ashe, Madison, Mitchell, Yancey	\$38,000
2007	Farm springhouse exhibit at North Carolina Arboretum	Buncombe	\$26,000
2008	Creation of Watauga County Quilt Trail	Watauga	\$11,350
2008	Farmers market promotion; start up of Asheville Farmers Market	WNC region	\$27,100
2008	Master plan for preservation of historic Monteith Farmstead	Jackson	\$15,000
2009	Farm promotion guidebook and Farm Promotion Summit	WNC region	\$33,500
2009	Farm-focused oral history exhibits at local museums	Avery, Burke, Transylvania	\$6,876
2010	Regional public awareness campaign for farmland preservation	WNC region	\$25,000
2010	Repair of Historic Carson House barn for farm life exhibit	McDowell	\$10,000
2011	Farm and food tourism promotion	WNC region	\$17,850
2011	First year of programming for Mill Spring Agricultural Center	Polk	\$24,700
2012	Brochure and website to promote Graham County Quilt Trail	Graham	\$3,455
2012	Signage for walking trails at Altapass Orchard	McDowell	\$8,850
2013	Nomination of Francis Mill to National Register of Historic Places	Haywood	\$1,500
2014	Greenhouse addition to working farm at Mitchell High School	Mitchell	\$18,000
2015	Self-guided historic barn tour brochure	Madison	\$7,000
2016	Renovations to historic barn to create community dance hall	Ashe	\$10,000
2016	Interpretive wayside exhibits at 8 agricultural heritage sites	WNC region	\$17,600
2017	Historic fence construction at Mountain Farm Museum	Swain	\$5,000

Fig. 3.15 Examples of Agricultural Heritage Projects



**Bill Carson, Orchard at Altapass Owner**

*“After discovering a troop of annual Revolutionary War re-enactors at my doorstep, I learned the history of the Overmountain Men and the King’s Mountain Battle which was fought here in 1780. The battle ended when 62-year-old soldier Robert Young shot the British commanding officer, Major Patrick Ferguson, with a rifle he nicknamed “Sweet Lips” after his wife. This victory has been called the turning point of the war in the south and it was fought right here in our backyard! So one day I told this story to an aunt in Tennessee and she said, “Lordy child, don’t you know anything? You’re telling a story about your great, great, great, great, great, grandfather.” I was shocked!*

*And sure enough, the rifle Sweet Lips is on display at the Tennessee State Museum! So that was when I vowed to preserve the Orchard. When I heard about the creation of the Blue Ridge National Heritage Area I immediately thought - that’s us! BRNHA was a godsend. Here’s someone looking over artificial borders and bringing the region together. Otherwise we’d still be counties fighting each other over red tape. BRNHA has given the Orchard grants to support all five heritage themes, music, crafts, Cherokee, agricultural, and natural heritage. We discovered that in addition to being a historic orchard and Revolutionary War battle site, this land also has remnants of ancient Cherokee artifacts. BRNHA introduced us to the Cherokee and gave us standing to work together with them, otherwise we never would have forged this partnership off the reservation.”*

## **Agriculture Conclusion**

BRNHA has helped to preserve traditional agricultural barns and orchards, operate working farms to educate students and future farmers, partner with learning institutions to expand agricultural preservation and development techniques, and develop farming workshops and farmers markets for local agritourism.

Specifically, ARCBridge has found that by investing in local agricultural programs, BRNHA has also allowed these institutions to expand their functionality into other heritage themes. For example the Orchard at Altapass is not just a 100-year-old apple orchard, but is now also the site of a prominent music hall, upcoming Cherokee exhibit, and Revolutionary War re-enactment.

### 3.7 Natural Heritage

The Blue Ridge Mountains are abundant with natural heritage. At over one billion years of age, the Blue Ridge Mountains are among the oldest in the world.

**BRNHA has sought to preserve, interpret, and develop this natural heritage through 42 grants since 2005, making up 21% of the 154 total grants distributed. One quarter of the total grant money from federal funding (\$2,123,579) has been used to promote natural heritage projects, totaling \$526,489.**

#### Projects include:

- 70 natural and cultural sites listed in the Heritage Trail Map with signs at 69 locations
- Creation of a documentary film about pioneering forestry educator Carl Schenck and the Cradle of Forestry
- Yadkin Valley Heritage Corridor: Grants from BRNHA supported the development of a new four county initiative to promote the Yadkin Valley as a destination for outdoor recreation, cultural heritage, and local foods and wines
- An economic impact study and informational materials supporting development of a proposed heritage river corridor in Jackson County (2015)
- Grant supporting the expansion of the Muddy Sneakers outdoor education program
- Grant supporting native trees/flora exhibit at the W. Scott Kerr Reservoir visitor center in Wilkes County (2010)

#### 3.7.1 Case Study: Interpretative Grants Supporting the Muddy Sneakers Program

In an effort to educate the next generation of North Carolinians on the vast natural heritage of the region, BRNHA awarded grants to an outdoor experiential learning program, the Muddy Sneakers program, which focuses on natural science education in protected and biodiverse lands.

#### Outcomes:

- Expanded program to three new schools in Henderson County and Rutherford County in 2016
- 178 fifth-grade students participated during the 2015-2016 school year

- Partners have expanded to include: the National Park Service, US Forest Service, and local land conservancies which provide sites for the outdoor learning program.

#### 3.7.2 Case Study: Supporting Forests and Climate Exhibit at the Cradle of Forestry

The 6,500 acre Cradle of Forestry Historic Site near Brevard commemorates the beginning of forest conservation in the United States. On this site in 1898, Dr. Carl Schenck, chief forester for George Vanderbilt's Biltmore Estate, founded the Biltmore Forest School, the first forestry school in America.

An \$18,000 BRNHA grant was awarded to create an engaging exhibit that focuses on the elements of climate and their effects on forests. The installation was completed in 2014 and included a fire education panel and highlighted the impacts of the various elements of climate and ongoing research on those elements.

#### Outcomes:

The site welcomed over 46,000 visitors in 2016 (an increase of 12.5% from 2015), and has considerable potential to expand visitation given its strategic location on scenic highway 276 (the Forest Heritage Scenic Byway) between Brevard and the Blue Ridge Parkway.

#### 3.7.3 Case Study: UNC-Asheville Pollinator Meadows

A BRNHA grant awarded in 2015 supported the establishment of demonstration pollinator meadows (vital habitat for pollinator species) on the UNC-Asheville campus and a how-to workshop for property managers. The meadows are used for teaching and student research.

#### Activities and outcome included:

- UNC-Asheville's pollinator workshop hosted 35 land managers from Western NC and from other locations
- The project team learned that meadows do not require nutrient rich soil and/or soil amendments to flourish
- UNC-Asheville is expanding pollinator meadows around the campus and has added a "Bee Hotel" exhibit

Fig 3.16 Examples of Natural Heritage Projects

Fiscal Year	Project	Counties Served	Dollars Awarded/ Expended
2005	Parkway interpretive exhibit at Folk Art Center	Buncombe	\$30,000
2006	Walking trail and bike trail development in 5 small towns	Avery, Clay, Madison, Mitchell, Rutherford	\$15,000
2007	Bike trail development and park improvements in 3 small towns	Clay, Mitchell, Rutherford	\$30,000
2008	Trail development for Murphy River Walk and Valley River Heritage Park	Cherokee	\$29,900
2008	Economic impact study for proposed Yadkin River Heritage Corridor	Caldwell, Surry, Wilkes, Yadkin	\$20,000
2008	Linking Lands and Communities conservation planning initiative	Buncombe, Haywood, Henderson	\$31,683
2009	Creation of new interpretive film for Cradle of Forestry historic site	Transylvania	\$20,000
2009	Film documenting conservation of World's Edge tract	Henderson, Rutherford	\$5,000
2010	Interpretive visitor map for the NC Bartram Trail	Graham, Macon, Swain	\$5,450
2010	Development of master plan for Mill Creek greenway in Old Fort	McDowell	\$10,000
2010	Native tree exhibit at W. Kerr Scott Lake environmental education center	Wilkes	\$35,000
2010	Symposium / other public events celebrating Parkway's 75th anniversary	WNC region	\$45,000
2011	Development of a bike route map for scenic rural roads	Mitchell, Yancey	\$5,000
2012	Creation of WNC Vitality Index for data on natural and cultural resources	WNC region	\$39,225
2012	Documentary about Bechtler Mint and gold mining in NC	Rutherford	\$10,000
2012	Workshops on green infrastructure planning	Buncombe, Haywood, Henderson	\$25,000
2012	Videos of points of interest in Great Smoky Mountains National Park	Swain	\$12,500
2013	Workshops to introduce planners to the WNC Vitality Index	WNC region	\$10,000
2013	Promotional rack card for the WNC Nature Center	Buncombe	\$2,370
2014	Economic impact study for Tuckaseegee River Heritage Corridor	Jackson	\$17,500
2014	Elements of climate exhibit at Cradle of Forestry historic site	Transylvania	\$18,000
2015	60-minute documentary about forestry pioneer Carl Schenck	WNC region	\$14,000
2015	Interpretive pollinator meadows on UNC-Asheville campus	Buncombe	\$8,000
2015	Expansion of Muddy Sneakers outdoor education program	Buncombe, Henderson	\$7,000
2016	Pocket guide to rivers and lakes in far-western counties	7 far-western counties	\$7,000
2016	Renovations to interpretive Rivercane Walk in Brasstown	Cherokee	\$10,000
2016	30-minute documentary about forestry pioneer Carl Schenck	WNC region	\$8,000
2016	Native plant botanical garden in Hayesville	Clay	\$6,000
2016	Interpretive wayside exhibits at 23 natural heritage sites	WNC region	\$50,600

### 3.7.4 Case Study: Documentary Films about Pioneering Forestry Educator Carl Schenck

With support from a \$14,000 BRNHA grant (awarded in 2013), the Forest History Society produced a 55-minute documentary film about pioneering forestry educator Carl Schenck and the Cradle of Forestry for broadcast on public television. The documentary, *First in Forestry: Carl Schenck and the Biltmore Forestry School*, traces the origins of U.S. forestry in Western North Carolina and tells the story of how Carl Schenck established a forestry school at the Biltmore Estate to pursue and promote best practices in Forestry across the country.

With support from a second BRNHA grant of \$8,000 (awarded in 2015), the Forest History Society created a 25-minute version of the documentary film for public television and for showing at the Cradle of Forestry in America Interpretive Site entitled *America's First Forest: Carl Schenck and the Asheville Experiment*.

### Outcomes:

- **This documentary first aired on UNC-TV in February 2016 and has since been broadcast in 42 other states on public television, raising national awareness about the heritage of the Blue Ridge region**
- The shorter film is shown daily at the Cradle of Forestry, April through November
- Having both 55-minute and 25-minute versions of the documentary greatly expanded the potential for broadcast by public television stations around the country
- **The films have also been distributed to teachers as well as to various forestry societies including the Forest History Society and the International Association of Landscape Ecology**

### 3.7.5 Case Study: Grant supporting Economic Impact Study For the Tuckasegee Heritage River Corridor—Cullowhee Revitalization Endeavor (CuRvE)

CuRvE began as a community improvement initiative designed to beautify and revitalize the Cullowhee area of Jackson County. It was first organized as a non-profit in 2007. Key activities included:

- Roadside cleanup
- Beautify the river park
- Greenway
- River cleanup

The CuRvE group put together an environmental plan that focused on revitalizing the river that runs through the area. In order to estimate the impact that these focused activities would have on the local community, an economist was hired to provide an economic impact assessment.

According to the economic impact assessment, these developments by CuRvE will lead to:

- a. \$1.2 million annually in additional spending in Jackson County
- b. Increase hiring by 16 new jobs
- c. An additional \$145,000 in tax revenues annually

#### Conclusion:

Natural heritage appears to be the least developed of the BRNHA themes in terms of hands-on activities and initiatives, in part because there are many other non-profits, such as land conservancies, working in the region and trail development is very costly. Although BRNHA has not yet developed signature projects for the natural heritage theme, it has made significant investments in promoting the Blue Ridge Parkway and providing visitor services.

ARCBridge was impressed with BRNHA's efforts in producing a documentary that celebrated pioneering forestry educator Carl Schenck. The work not only ensured the digital preservation of this history, but also allowed BRNHA's interpretive efforts to reach a wider audience through national distribution via PBS.

BRNHA also promotes and interprets many national parks, national forests, and state park sites that are a part of the Blue Ridge Heritage Trail, which will be discussed later in the section. Natural heritage projects have also received the most grant money, \$526,489, which has allowed improvements in small towns including development of walking and biking trails.

### 3.8 Cumulative Impact Case Study: Hayesville

In addition to cultivating “signature” programs and allocating grant funds across the region, BRNHA has invested significant funds into revitalizing historic small towns hit hard by the recession, investing in all heritage assets in these towns to make them more viable.

Located two hours from Asheville and Atlanta, the tiny mountain town of Hayesville, North Carolina, pop. 300, is one such site that has received assistance from BRNHA over the past decade in the form of eight preservation, interpretation, and development grants totaling \$44,100.

Hayesville was originally an active participant in Hand-Made in America’s Small Town Revitalization Program, which trained community leaders to identify cultural assets for development, leverage resources, and implement projects selected through a competitive grant process.

Spearheaded by the local Clay County Communities Revitalization Association (CCCRA), volunteers and town leaders have connected many of these projects physically with a two-mile Cherokee-themed walking trail, “the Quanassee Path,” which runs from the Native Plant Botanical Garden through the historic downtown, to the Spikebuck Mound, the former site of the small Cherokee town of Quanassee.

**These combined efforts have helped rebuild Hayesville into a destination town. In 2017 alone, Hayesville was nominated as a Reader’s Digest finalist for “America’s Friendliest Town” and was a key tourist site along the “Path of Totality” during the August 2017 solar eclipse, bringing in thousands of tourists and national attention.**

#### Jackrabbit Trail

- A \$5,000 grant to CCCRA (awarded in 2005 and administered through HandMade in America) helped the town prepare a plan for the development of the Jackrabbit Trails at Lake Chatuge
- \$9,000 (awarded in 2006 and administered through HandMade in America) helped CCCRA build the first few miles of trail
- Developed by a coalition of partners, including the Southern Appalachian Bicycling Association, the U.S. Forest Service, and CCCRA, the Jackrabbit Trail now offers mountain bikers nearly 15 miles of single-track trails that are designed to appeal to all skill levels

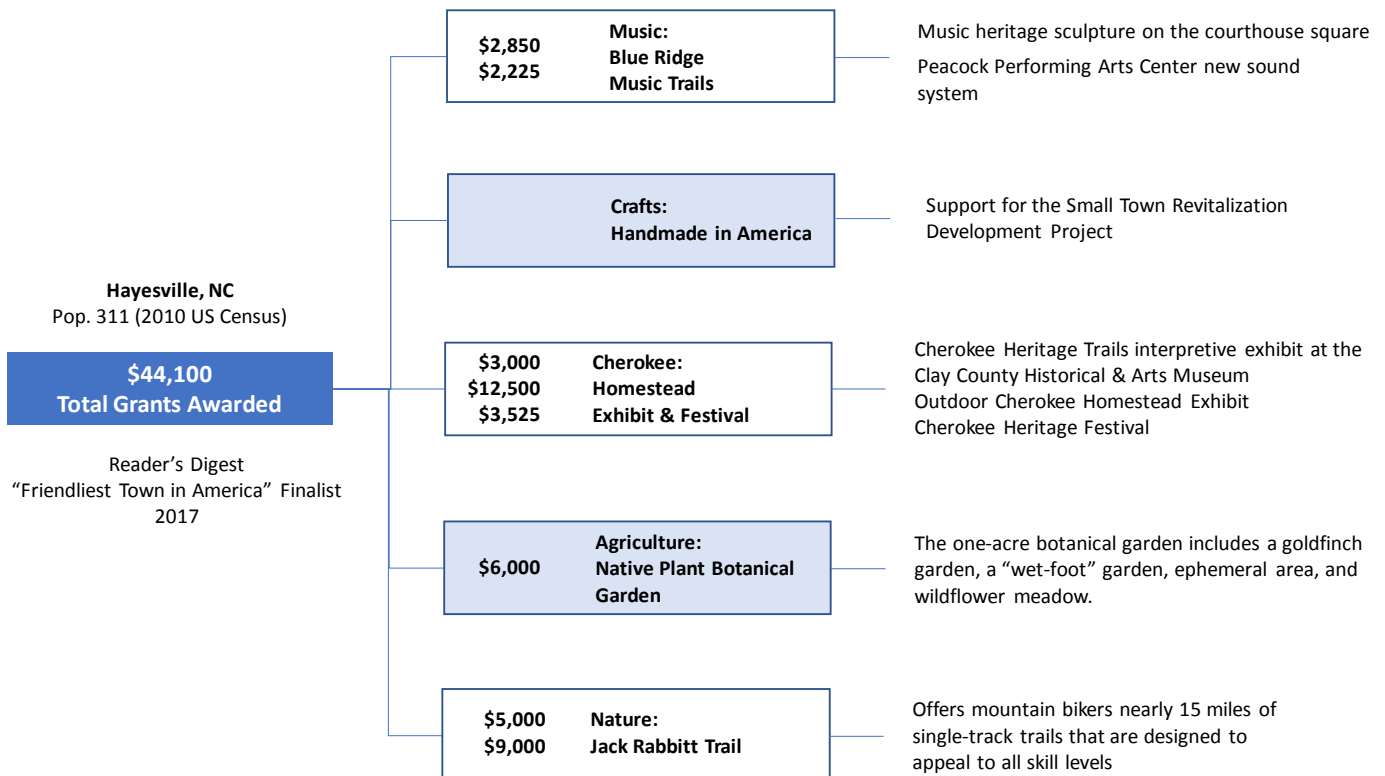


Fig 3.17 Hayesville Summary

## Cherokee Homestead Exhibit

- Hayesville became a destination site on the Cherokee Heritage Trails with support from a \$3,000 BRNHA grant (awarded in 2004) to the North Carolina Folklife Institute to help design a Cherokee interpretive exhibit at the Clay County Historical And Arts Museum
- A \$12,500 BRNHA grant (awarded in 2009) supported the creation of a Cherokee winter house, a centerpiece of a larger outdoor exhibit that portrays a typical Cherokee homestead from late 16th century to the 18th century
- The Cherokee Homestead Exhibit opened to the public in October 2010, and has since drawn tens of thousands of visitors
- CCCRA partnered with the Eastern Band of Cherokee Indians and Western Carolina University to ensure authenticity and develop education programs for school children, college students, and the general public at the heritage site
- A \$3,525 BRNHA grant (awarded in 2011) helped CCCRA develop curriculum materials and launch an annual Cherokee Heritage Festival to strengthen the site's capacity as an outdoor classroom
- More than 700 people attend the annual Cherokee Heritage festival
- These initiatives allowed for increased visitation to Hayesville, greater awareness of Cherokee history, and increased income for Cherokee tradition bearers

*"We needed to tell the story of the Cherokee history in Hayesville - authentically with their permission. Thanks to BRNHA, we were able to coordinate with academics and Cherokee leaders who helped us tell this story."*

*- Sandy Nicolette  
Director, CCCRA*

## Native Plant Botanical Garden

- A \$6,000 BRNHA grant to the Clay County Historical and Arts Council (awarded in 2015) supported the creation of a native plant botanical garden on a site adjacent to the heritage park
- Installed by volunteers, who salvaged a portion of the plant material from a highway construction site, the one-acre botanical garden includes a goldfinch garden, a "wet-foot" garden, butterfly reserve, ephemeral area, and wildflower meadow
- This Botanical Garden helped increase community awareness of natural heritage and native plants

## Blue Ridge Music Trails

The Town of Hayesville and the Peacock Performing Arts Center are participating in the Blue Ridge Music Trails of North Carolina initiative by listing their traditional music events on the BRMT web calendar and displaying BRMT signage. In 2017 BRNHA awarded two new grants that will enhance the town as a destination on the Music Trails:

- \$2,850 to the Clay County Communities Revitalization Association for a music heritage sculpture on the courthouse square in downtown Hayesville
- \$2,225 to the Peacock Performing Arts Center for a new sound system to support music performances and assist in increasing income for musicians

*"The BRNHA grants have given us the means to host a community theater the level of Atlanta while maintaining a coffeehouse atmosphere where you feel like you know the artists and are listening to the stories of old friends."*

*- Harry Baughn  
Hayesville Mayor*



### Harry Baughn, Hayesville Mayor



*“Hayesville is the very definition of small town Americana - here everyone volunteers at church, at the fire department, and at the schools. It’s an economically stressed area with a tight knit community of retirees and halfbacks - people who wanted to move down south to Florida and stopped once they saw these mountain views. In fact, we have many stories of folks stopping in and buying property by the end of the day! Hayesville was very much looking to reinvent itself and in the last few years there have been changes for the better. Before, locals here didn’t know what to do or say about Native American heritage - it was the elephant in the room.*”

*BRNHA has brought it out that there is a rich heritage to brag about and be proud of. The Cherokee village was a real attention getter as a visual, especially the annual festival. The Songwriter Showcase at the Peacock Playhouse featuring regional music and the Jackrabbit Trail - all of these things add together. There is more attention in downtown Hayesville than ever, so much so that we are opening three restaurants, which is very exciting! We want to keep the momentum going to improve the walkability and increase tourism.”*

### Hayesville Conclusion

Several local citizens that were surveyed by ARCBridge confirmed that BRNHA efforts have indeed been a major factor in the revitalization of this small town. The most significant impacts have been infusing this economically stressed rural area with cultural attractions, such as regular concerts at the Peacock Playhouse and the Cherokee Homestead Exhibit.

During the site visit, ARCBridge observed how BRNHA has aided in reinventing Hayesville from an economically depressed rural town into a vibrant tight knit community with a rich heritage. The Cherokee Homestead Exhibit brings in school groups and hosts an annual Cherokee festival that allows the town to gain tourism dollars while also taking pride in its centuries old traditions. The Songwriter Showcase at the Peacock Playhouse features regional music and attracts talent from across the Appalachian region. And the Jackrabbit Trails have become a big draw for outdoor enthusiasts and mountain bikers, who are increasingly moving to the area to enjoy its natural beauty and amenities.

### 3.9 Marketing & Tourism Activities

The Blue Ridge National Heritage Area brand was created in 2005 with a detailed marketing program that was developed to complement and support the marketing efforts of regional tourism partners. Initially, the Blue Ridge National Heritage Area Management Plan included the creation of the “Blue Ridge Go Card,” a multi-attraction pass that visitors could purchase at the Blue Ridge Parkway Visitor Center and at more than 30 attractions in the region. This program proved to be unsuccessful for BRNHA as there were not enough purchasers of the card and BRNHA was dropped from the program by the national company that created it.

**In the past five years, BRNHA marketing efforts have focused on public relations, social media and website Search Engine Optimization. The organization has been the recipient of several Google marketing grants that have dramatically increased visits to the website. Marketing and public relations have been directed specifically toward the Blue Ridge Music Trails and the Blue Ridge Heritage Trail.**

Marketing toolkits have been created to help partners align their publicity plans with these programs. Other publicity has been directed to the regional impact of BRNHA grants. Marketing components include:

#### Advertising:

- Initial purchase of advertising in NC Travel Guides, Asheville Travel Guides, Blue Ridge Parkway Association publications and regional maps, and a dedicated display in the Asheville Visitor Center. This advertising was developed to support visitation to the Parkway Visitor’s Center
- Cooperative marketing and advertising contracts with three regional hosts groups - Smoky Mountain Host, Blue Ridge Mountain Host, and High Country Host. This program has averaged a six to one match over the last five years for the federal dollars. BRNHA has expended and has supported visitation to these sub regions

#### PR Campaigns:

- Launch of a “Proud to be a Part of the Blue Ridge National Heritage Area” campaign
- “Living Traditions,” a campaign that generated stories in local, regional, and national publication

- Partner with a regional public radio station and a regional cultural/lifestyle magazine to create and air 52 “Living Traditions Moments” radio spots, which now reside on the BRNHA website

#### Promotional Materials:

- Distribution of two monthly newsletters for partners and for visitors.
- In 2013, BRNHA added an additional e-news for the Blue Ridge Music Trails. Overall subscribers have increased from 7,000 to nearly 15,000 over the last three years
- Creating and distributing more than 500,000 Blue Ridge National Heritage Area map brochures, Blue Ridge Parkway Visitor Center rack cards, and Artist Directory rack cards

#### Media Publications:

**BRNHA programs have been featured in USA Today, Asheville Citizen-Times, Sylvia Herald, Cherokee Scout, Blowing Rocket, Watauga Democrat, High Country Press, WNC Magazine, LonelyPlanet.com, and other publications.**

#### Online Marketing

- Development of a comprehensive website blueridgeheritage.com, a Traditional Artist Directory with information on more than 500 musicians and craftspeople, and a robust events calendar. The BRNHA website had over 328,000 user sessions with 909,000 page views over the past year
- Presence on Facebook and other social media
- Creation of a separate websites to market BRMT - blueridgemusicnc.com - and the Blue Ridge Heritage Trail - blueridgeheritagetrail.com

#### Community Intercept Surveys

The ARCBridge team undertook a series of community intercept interviews over the course of the BRNHA evaluation. Some of these interviews took place with community members during our visits to the small towns of Hayesville and Cherokee, both recipients of a number of BRNHA grants. Other interviews took place at various BRNHA project locations, including the Orchard at Altapass, Penland School of Crafts, The Biltmore Estate, and the Cowee School Music Hall. In conjunction with the interviews, ARCBridge attempted to determine:

- What consumers knew about BRNHA
- How they learned about the specific site that they visited
- Would they be likely to recommend visiting the Heritage Area and/or the specific sites to their friends and acquaintances

The results of the interviews indicated that visitors were enthusiastic about the sites they were visiting, but were mostly unaware of the role of the National Heritage Area and its activities in supporting these exhibits, facilities, and venues. Among the cross section of people surveyed by ARCBridge, there was a general understanding and an appreciation of the vast historical, cultural, and natural resources of the region and a desire to learn more about BRNHA activities. Some participants, especially those from out of town, were more familiar with the Blue Ridge Parkway Visitor Center as a starting off point for tourism information on which sites to visit.

Other community members knew of the Blue Ridge Music Trails concerts, but still hadn't linked it in their mind with Blue Ridge National Heritage Area efforts, despite the BRMT signs that have been put up at each music site. While people above 50 years old seemed to have more of an awareness about the existing activities, those under 35 were more enthusiastic to learn more about BRNHA, and perhaps even get involved.

ARCBridge believes that BRNHA could capture more of the general public's attention through more innovative marketing methods on social media to target a new audience of young people living in Asheville and the surrounding areas. The Biltmore Estate is one of the largest tourist attractions, and while BRNHA's hospitality training partnership with Biltmore was a step in the right direction for educating tourists, ARCBridge did not see this translate into visitors fully understanding the range of BRNHA offerings available to them. ARCBridge has, however, identified that a large population of older citizens who are very active within the community could be utilized as brand ambassadors or tour guides to further cement BRNHA's heritage tourism platform.

### Case Study 3.9.1: Tourism Hospitality Training Workshops

In the spring of 2016, BRNHA conducted four sub-regional Hospitality Training Workshops at local community colleges. Through a partnership with the Biltmore Company, a discounted rate was offered at \$35 vs. \$900.

These trainings were targeted towards partners in the tourism, arts, and museum communities - locals and hospitality workers. The goal was to increase awareness of local BRNHA cultural sites, events, and activities through word of mouth promotion and to help these small businesses create a stronger culture of service within their organizations. 168 employees were trained as "Brand Ambassadors" and 40 of the participating businesses were later tested through mystery shopping.

*"We had completed 13 listening sessions for the Blue Ridge Music Trails and the biggest conclusion we came to was that locals think there is nothing to do around here. That is shocking, because that means when tourists come into their stores asking for recommendations, they don't have anything to offer. We realized we needed to rally together these workers as brand ambassadors in order to spread awareness about BRNHA and its numerous heritage tourism resources."*

*- Becky Anderson  
Founding Board Member, BRNHA*

A survey by Magellan Strategy Group provided the following feedback from the "Brand Ambassadors":

- 96 % of attendees rated the Hospitality Training excellent or good
- 90% stated the training was relevant to their business
- 88% said the training provided them with the ability to share information with others at their business
- 90% stated the training will overall help their businesses

When asked about the greatest benefits of the training:

- 86% stated it helped them learn about creating an internal culture of hospitality and customer service for their business
- 57% stated networking with participants
- 53% stated learning more about the Blue Ridge National Heritage Area region and what there is to see and do
- 27% stated dealing with difficult customers

Fig 3.18 Examples of Workshops and Trainings Provided by BRNHA

Fiscal Year	Workshop/Training	Location	Attendance
2005	Arts and Tourism Workshops	Asheville, Boone, Franklin, Lenoir	200
2005	Gateway Communities Training Conferences (two events)	Asheville	87
2007	Grantwriting Workshop	Asheville	33
2007	Social Capital Workshop	Asheville	78
2008	Nonprofit Management Workshops	Asheville, Bryson City, Valdese	46
2009	Fundraising Workshops	Asheville, Bryson City, Valdese	112
2009	Nonprofit Management Workshops	Asheville, Bryson City, Morganton	50
2009	Workshops on Quilt Trails and Junior Appalachian Musicians Programs	Hendersonville	81
2010	Nonprofit Financial Management Workshops	Asheville, Bryson City, Morganton	30
2011	Essential Grant Skills Workshop	Asheville	26
2012	Volunteer Management Workshop	Asheville	32
2013	Media Relations Workshop	Asheville	30
2013	Group Tour Best Practices Workshops	Bryson City, Valdese	57
2014	Music Trails Workshops for Partner Venues and Organizations	six locations around region	68
2015	Group Tours Workshop	Canton	32
2015	Seasonal Training for Parkway Visitor Center staff and volunteers	Asheville	30
2016	Music Trails Social Media Training Workshops	Asheville, Boonville, Cherokee, Valdese	53
2016	Blue Ridge Hospitality Trainings	Hudson, Spruce Pine, Sylva, Waynesville	165

Fig 3.19 BRNHA Website, Facebook Stats

2014	2015	2016
blueridgeheritage.com	blueridgeheritage.com	blueridgeheritage.com
380,000 users	363,384 users	334,755 users
453,000 sessions	433,450 sessions	397,393 sessions
1,145,000 page views	1,091,948 page views	970,512 page views
BRNHA Facebook	BRNHA Facebook	BRNHA Facebook
3,698 Likes	4,401 Likes	5,372 Likes
blueridgemusicnc.com	blueridgemusicnc.com	blueridgemusicnc.com
Music Trails website launched April, 2014	54,444 users	91,198 users
10,675 users	66,377 sessions	110,930 sessions
13,595 sessions	147,977 page views	235,287 page views
39,220 page views		
BRMT Facebook	BRMT Facebook	BRMT Facebook
1,358 Likes	1,929 Likes	2,545 Likes
		Blue Ridge Heritage Trail website launched
		blueridgeheritagetrail.com
		11,002 users
		13,752 sessions
		51,450 page views

### 3.10 Blue Ridge Parkway Visitor Center

In 2007, the Blue Ridge Heritage Area Partnership signed a cooperative agreement with the Blue Ridge Parkway to operate a regional information desk at Blue Ridge Parkway's new flagship regional Visitor Center in Asheville. The Blue Ridge Parkway Visitor Center is a National Park Service (NPS) facility. It is operated by NPS in partnership with BRNHA and Eastern National. BRNHA activities have included staffing, answering phones, purchasing advertising, organizing events, developing and maintaining the I-Wall map, arranging group tours, and promoting the Parkway and gateway communities at tourism trade shows and during media visits.

#### By the Numbers:

- The Blue Ridge Parkway comprises of 469 miles in North Carolina and Virginia
- Welcomes approximately 15 million visitors each year
- Generates an economic impact of more than \$952 million annually
- Often heralded as the most visited National Park Service unit in the United States
- The 22-minute, award-winning film shown at the Blue Ridge Parkway, tells the story of the Parkway and the communities off the Parkway that showcase the five heritage themes of the BRNHA

#### BRNHA Spending:

From 2007 to 2009, a state appropriation helped support the staffing, operations, and visitor technology at the Blue Ridge Parkway Visitor Center. In 2009, the state ended its support of BRNHA because of the recession, and the organization absorbed these expenses as part of its federal appropriation.

In any given year, 13-17% of the BRNHA annual federal appropriation supports its operations at the Blue Ridge Parkway Visitor Center, which is open 362 days a year, seven days a week.

#### BRNHA Staffing:

- BRNHA employs a full-time staff member who manages BRNHA's role in the Visitor Center - including partners, volunteers, events, and groups

- BRNHA employs three part-time staffers who serve as desk clerks for the Visitor Center, helping travelers plan their visits to the area and answering the phone lines
- BRNHA manages a pool of 14 BRNHA volunteers
- BRNHA volunteers have logged 7,177 hours since the Visitor Center opened in December 2007
- BRNHA staff working with Blue Ridge Parkway and Eastern National staff and volunteers have served more than 878,000 visitors from throughout the United States and around the world
- BRNHA desk offers more than 150 partner brochures on an annual basis

To help publicize the Visitor Center, BRNHA purchases annual advertising in:

- Regional maps
- Blue Ridge Parkway Association Directory
- Blue Ridge Parkway Association map brochure

#### Blue Ridge Parkway 75th Anniversary:

In 2009, the BRNHA Board of Directors supported the Blue Ridge Parkway's 75th Anniversary by providing a \$45,000 grant to support anniversary education programs

#### I-WALL:

BRNHA is responsible for the development and ongoing maintenance of the interactive "I-Wall", a 22-foot long map of the Parkway. over which a large plasma screen rolls to reveal what there is to see and do along the way.

The I-Wall features audio, video, text, and images of 110 natural and cultural heritage attractions along the length of the Parkway in both Western North Carolina and Southwest Virginia.

Fig 3.20 Blue Ridge Parkway Visitor Center Record of Visitors

## BY FISCAL

Fiscal Year	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Total
2008			1,391	977	1,280	2,030	3,454	3,793	4,377	4,993	3,910	2,808	29,013
2009	6,031	2,996	1,538	1,244	1,383	2,719	3,767	5,920	8,917	11,043	6,690	7,334	59,582
2010	14,166	5,635	1,603	977	1,032	3,502	6,059	8,595	10,687	13,356	13,392	9,161	88,165
2011	19,309	2,257	5,863	1,153	2,097	3,850	6,880	7,351	9,714	12,921	9,552	9,223	90,170
2012	21,192	5,736	3,765	2,002	2,300	5,675	9,467	8,309	10,247	12,006	8,798	8,572	98,069
2013	19,495	6,177	3,963	2,033	1,968	4,730	7,386	9,735	11,436	13,780	12,131	11,113	103,947
2014	12,997	8,695	4,328	1,688	2,088	5,131	8,400	9,901	12,264	14,993	12,848	10,092	103,425
2015	27,603	7,643	5,098	2,923	1,880	6,607	8,595	11,418	12,106	16,248	12,635	11,450	124,206
2016	24,543	7,972	6,338	2,943	3,005	9,726	10,148	13,590	14,672	15,593	12,143	12,383	133,056
2017	23,106	11,520	6,942										

## BY CALENDAR YEAR

Calendar Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
2007												1,391	1,391
2008	977	1,280	2,030	3,454	3,793	4,377	4,993	3,910	2,808	6,031	2,996	1,538	38,187
2009	1,244	1,383	2,719	3,767	5,920	8,917	11,043	6,690	7,334	14,166	5,635	1,603	70,421
2010	977	1,032	3,502	6,059	8,595	10,687	13,356	13,392	9,161	19,309	2,257	5,863	94,190
2011	1,153	2,097	3,850	6,880	7,351	9,714	12,921	9,552	9,223	21,192	5,736	3,765	93,434
2012	2,002	2,300	5,675	9,467	8,309	10,247	12,006	8,798	8,572	19,495	6,177	3,963	97,011
2013	2,033	1,968	4,730	7,386	9,735	11,436	13,780	12,131	11,113	12,997	8,695	4,328	100,332
2014	1,688	2,088	5,131	8,400	9,901	12,264	14,993	12,848	10,092	27,603	7,643	5,098	117,749
2015	2,923	1,880	6,607	8,595	11,418	12,106	16,248	12,635	11,450	24,543	7,972	6,338	122,715
2016	2,943	3,005	9,726	10,148	13,590	14,672	15,593	12,143	12,383	23,106	11,520	6,942	135,771

## Events:

BRNHA has supported the Blue Ridge Parkway and a third partner in the facility, Eastern National, by co-hosting and or supporting more than 75 events at the center over the last nine years. BRNHA has hired 46 traditional musicians and craft artisans to perform at Blue Ridge Parkway Visitor Center events. Sample events include:

- Co-hosted a book signing for the popular *Serafina and the Black Cloak*, a work of young adult fiction that uses the Biltmore estate as its setting. The event helped set a record attendance for a single day (1,866 - May 2016)
- Co-hosted a traveling exhibit of banjos that traced the evolution of banjo designs. (July 2016)
- Co-hosted a “Feast to the Beat” day at the Visitor

- Center to help celebrate the NPS Centennial. The event featured cooking demonstrations by celebrity chefs and filmed recording sessions of local artists in the traveling *Jam in the Van* bus (August 2016)

## Sales:

- Because of additional visitation in the facility over that last five years, Eastern National’s Blue Ridge Parkway Visitor Center Store has consistently exceeded its sales goals on average by 16 percent
- BRNHA has sold product to Eastern National, including T-shirts and Traditional Music CDs for sale in the Blue Ridge Parkway Store
- Income from sales in FY15 - \$527; FY16 - \$1,082; and FY17 - \$2,136
- The Parkway Store also sells the Blue Ridge Music Trails of NC guidebook

### 2010 BRNHA Survey of Travelers at the Visitor Center:

- **As a result of their visit to the Visitor Center, 42% of respondents adjusted their travel plans ON the Parkway**
- 34% of respondents adjusted their travel plans OFF the Parkway after stopping at the Visitor Center
- **95% of respondents stated they would recommend the Visitor Center to others**
- A similar survey was conducted in 2011. A key finding in that study was that six percent of visitors to the Visitor Center said they were adding an overnight stay in the region as a result of stopping at the Blue Ridge Parkway Visitor Center

### BRNHA Group Tours:

BRNHA has hosted more than 10 AAA Familiarization Tours and more than 40 Familiarization Group Tours and programs at the Visitor Center during the last nine years. In 2015, BRNHA participated in the *Travel South Familiarization Tour*, hosting 10 international travel planners from the UK, Italy, Germany and The Netherlands.

BRNHA arranged and hosted a total of 21 group tours in FY16, serving a total of 630 visitors including:

- Tauck Tours (music program at the Folk Art Center or Parkway Visitor Center) — 15 groups
- Mid-Atlantic Receptive (downtown Asheville)
- Prince Avenue Baptist Church (3-day regional tour including Asheville and Lake Lure)
- First Avenue Baptist Church (Parkway tour with music program)
- Clyde Erwin Middle School (trip to Rural Heritage Museum with music program)
- Clarksville Parks & Recreation (trip to Flat Rock and Cherokee with music program)
- Creative Tours by Pat (trip to Folkmoot Festival)

### 3.11 Heritage Trail

Installed in the fall of 2015 and completed in 2017, the comprehensive “Blue Ridge Heritage Trail” weaves together 70 heritage destinations across Western North Carolina. Signs are located along main walkways at historic, natural and scenic sites, attractions, towns and cities, in some state parks, along the Blue Ridge Parkway, in the Great Smoky Mountains National Park, and at five North Carolina Welcome Centers within the Blue Ridge National Heritage Area.

#### Sites include:

- National and State Parks
- Historic Sites
- Museums
- Craft Destinations
- Farms and Gardens
- Waterfalls
- Music Venues

#### The project infrastructure consists of:

- Interpretive wayside exhibit signs at 69 locations (encompassing all five BRNHA interpretive themes)
- Interactive kiosks at five North Carolina welcome centers
- A mobile-friendly website launched in February 2016 ([blueridgeheritagetrail.com](http://blueridgeheritagetrail.com))
- A printed visitor map/brochure
- Hiring a digital marketing firm to produce a social media marketing plan & optimize SEO

#### Outcomes:

- **The Heritage Trail brochure received a multi-media award from the North Carolina Society of Historians**
- In the first year, the website attracted 11,882 users generating 13,752 sessions and 51,450 page views through the end of FY16
- **In the 2nd year, website traffic doubled with 22,500 users having visited the Heritage Trail website viewing 86,500 pages**
- A Facebook/e-News campaign highlighted stories of about 20 sites on the trail, boosting traffic to the website by 36% this summer as compared to 2016
- **More than 100,000 map brochures have been printed and are currently being distributed at welcome centers, businesses, and attractions**

### 3.12 Conclusions

Through data collection, analysis, site visits, and interviews with partners, grant recipients, and the community at large, the ARCBridge team has observed several overall trends pertaining to BRNHA activities:

#### 1. Fostering Strong Partnerships is Always Top Priority

In accordance with the 10-year BRNHA Management Plan, BRNHA activities reflect a strong focus on partnerships, brand recognition, and providing assistance through grants to smaller localized organizations that have similar heritage preservation, interpretation, and development objectives.

The ARCBridge team has counted hundreds of BRNHA partners and recognizes the strategy behind this approach is due to the diverse geopolitical climate within the region and its 25 county boundaries. ARCBridge commends BRNHA for its key leadership role as the glue that binds numerous other organizations together under one united platform.

According to the current BRNHA Executive Director, Angie Chandler, “BRNHA is very sensitive to the fact that there are numerous older organizations in the region and we make certain to never step on anyone else’s toes or jurisdiction, therefore each activity inevitably involves other partners.”

#### 2. Targeted Focus on Grants to Reach & Impact Rural Communities

Since 2004, BRNHA has awarded 154 local grants totaling more than \$2.1 million to 97 local organizations. The current grant match total is \$3.7 million. Through thorough analysis, ARCBridge believes the dissemination of these grants into small communities across the vast region has yielded far reaching results, greatly increasing the number of preservation, interpretation, and development programs, sites, and exhibits around the region.

Specifically BRNHA has acted as an incubator and has allowed many innovative projects the opportunity to gain initial funding to flourish. BRNHA has funded different projects from the same organizations as part of an overall effort to effect change in one area. After site visits and evaluating the overall effects multiple BRNHA preservation, interpretation, and developmental grants across the five heritage themes have had on many rural areas,

**ARCBridge has found that BRNHA has effectively carried out its goal to spearhead change in concentrated small towns hit by the economic recession.**

In the mountain town of Hayesville, the ARCBridge team witnessed how eight BRNHA grants totaling \$44,100 were able to completely transform the town - by revitalizing the local music hall, designing an interpretive Cherokee exhibit, creating a one acre botanical garden, and building 15 miles of bike trails. These efforts have enhanced the quality of life for its 300+ citizens, and have boosted Hayesville's tourism capacities for the thousands of visitors that descended on the area during the Path of Totality Solar Eclipse event in August 2017. Similarly, grants have allowed the historic Orchard at Altapass to expand its cultural resources beyond just an agricultural farm with a retail store to include a popular music hall and Cherokee exhibits.

#### 3. Promoting Economic Tourism through Awareness Workshops and Signature Initiatives

In addition to allocating grants throughout the region, BRNHA has focused efforts on increasing tourism opportunities through organizing marketing efforts through specialized public relations campaigns, distributing awareness materials, attending regional and national conferences, and engaging regional partners in hospitality trainings and social media workshops.

After foregoing the annual grant giving cycle in 2008 and 2010 to allocate funds for staffing, marketing, and signature events initiatives, BRNHA decided to make the grants program biannual and lower the amount of money awarded. This was part of an effort to show BRNHA to be more than just a grant giving organization as BRNHA had created enough partnerships and marketing strides to move onto its signature initiatives, like the Blue Ridge Music Trails program.

Besides grant making, the top activities have been:

- Marketing
- Blue Ridge Music Trails
- Heritage Trail (regional signage program)
- Blue Ridge Parkway Visitor Center and group tours



After spending years establishing an organizational structure and gaining trust within the regional community, BRNHA has concentrated efforts into producing signature branded projects. These include activities such as branding, hiring consultants, building websites, offering technical assistance, publishing books, maintaining a social media presence, and working daily on a focused marketing strategy.

#### **4. Three Signature Trails that have defined BRNHA's Legacy and Leadership Role in the Region**

The inaugural initiative, the Blue Ridge Music Trails of North Carolina has been a massive undertaking, spearheaded by BRNHA, involving hundreds of regional and local partners. All partners and participants interviewed by the ARCBridge team have reported overwhelmingly positive responses to working with BRNHA, and have seen their local businesses benefit from the boost in music related tourism.

The Blue Ridge Music Trails took nearly a decade of hands-on efforts to implement and symbolizes what ARCBridge views as the turning point for BRNHA's regional reputation. More local organizations have begun to look at BRNHA for not just program support or grant money, but to fill a void in community leadership. In ARCBridge conducted interviews, historic crafting institutions and new artisans both overwhelmingly expressed their desire for BRNHA leadership in the formation of the upcoming BRNHA Crafts Trails.

Overall, ARCBridge believes three key organizational programming initiatives - Blue Ridge Music Trails which involved hundreds of partners, the recently completed Heritage Trail which links 70 heritage points of interest across BRNHA, and the upcoming digital Crafts Trails - reveal the significant evolution of BRNHA goals over the past decade.

ARCBridge notes BRNHA's transition from a grant giving support organization into the premiere heritage leader in the region connecting together major cultural, interpretive and natural sites to boost regional tourism and recognition.

#### **5. BRNHA's Unique Ability to Inspire a Stronger Sense of Community Pride in Local Heritage**

By profiling the unique stories of community members and documenting over two dozen case studies, ARCBridge has recognized a deeper intrinsic value that BRNHA has offered and that is important to acknowledge in this evaluation. Through preservation, interpretation, and developmental initiatives, BRNHA has been able to boost local pride and heritage identity amongst different communities and individuals across the region.

These initiatives include:

- Providing economically disadvantaged schoolchildren the chance to learn and honor their grandparents' generation's music
- Educating depressed Cherokee youth on their ancestral roots to enable them to be ambassadors for their culture
- Empowering craft artisans with the proper tools to flourish as business savvy entrepreneurs who can support their families
- Boosting tourism in rural towns by showcasing their revitalized authentic music, crafts, Cherokee, agricultural, natural heritage sites and resources

BRNHA has made an impact on hundreds of advocates who have worked for decades on heritage projects by tying their local goals for preserving the land, its traditions, and its stories to a national network bound by a common passion rather than political red tape.

After months of evaluating BRNHA activities, speaking to partners, locals, and tourists, the ARCBridge team is confident that the broad scope of BRNHA programs have not only made an indelible impact on preserving, interpreting, and developing the cultural heritage of Western North Carolina, but have also motivated hundreds of organizations and individuals to follow in BRNHA's footsteps to effect local changes that can be felt on the national and even international level.

## Section 4 – Impact of Public/Private Investments on BRNHA

The legislation authorizing the Blue Ridge National Heritage Area (Blue Ridge National Heritage Act of 2003, Public Law 108-108, November 10, 2003, 117 stat. 1280) provides appropriations to BRNHA under the following conditions:

(1) “IN GENERAL - There is authorized to be appropriated to carry out this section \$10,000,000, of which not more than \$1,000,000 shall be made available for any fiscal year.”

(2) “NON-FEDERAL SHARE— the non-federal share of the cost of any activities carried out using federal funds made available under subsection (a) shall be not less than 50 percent. “

It should be noted that the non-federal share of matching funds also includes matching funds that are generated by grantees that have received funding from BRNHA, Inc., as well as in-kind support provided by other entities.

(BRNHA, Inc. is the management entity or coordinating entity that is designated by Congress to manage BRNHA using funds provided by NPS.)

### 4.1 Investments in BRNHA Activities

Table 4.1 shown below outlines the direct investments that have been made in the Blue Ridge National Heritage Area, including funds from:

- The National Park Service (NPS), which invested funds designated by the NPS Heritage Partnership Program (HPP). These funds are designated specifically for use to develop and maintain the National Heritage Area. BRNHA has received no funds from NPS other than Heritage Program funds
- Non-NPS federal sources including the National Endowment for the Arts, the Appalachian Regional Commission, and the Federal Highway Administration
- Other funds which include state and local monies, foundations, and private donations
- In-kind investments from organizations which provide in-kind services to projects (e.g., donated meeting facilities, volunteers, or labor) in lieu of direct investments in NHA programs
- Sub-grantee match funds generated by grantees in order to match the grant funds provided to them by BRNHA

Fiscal Year	NPS/NHA funds	Non-NPS Federal Funds Received	Total Reported Match	Total Investment in BRNHA Projects
2004-2005	\$434,395		\$583,670	\$1,018,065
2006	\$590,801	\$22,385	\$1,132,056	\$1,745,242
2007	\$984,894		\$1,035,004	\$2,019,898
2008	\$709,857		\$1,112,524	\$1,822,381
2009	\$863,366		\$1,190,712	\$2,054,078
2010	\$803,710		\$970,325	\$1,774,035
2011	\$663,482	\$3,744	\$869,116	\$1,536,342
2012	\$760,185	\$10,582	\$761,788	\$1,532,555
2013	\$746,361	\$39,859	\$705,124	\$1,491,344
2014	\$844,797	\$36,209	\$948,780	\$1,829,786
2015	\$705,684	\$67,442	\$706,818	\$1,479,944
2016	\$598,425	\$194,583	\$712,060	\$1,505,068
<b>Total</b>	<b>\$8,705,957</b>	<b>\$374,804</b>	<b>\$10,727,977</b>	<b>\$19,808,738</b>

**Table 4.1: Investments in the BRNHA Program by Year**

The table above shows that total investments in the program amounted to \$19.8M over the period between 2004 and 2016. NPS/NHA investments were \$8.7M and non-NPS federal sources provided nearly \$375,000. Non-NPS federal funds were provided by other federal agencies including the Department of Transportation, the Appalachian Regional Commission, and the National Endowment for the Arts. Reported matching funds include funds from state and private sources, in-kind investments and sub-grantee matching funds. These match revenues amounted to \$10.7M.

#### 4.1.1 Non-Federal Matching Funds

Table 4.2 below shows the detailed level of non-federal matching funds received year-by-year.

The data in the table reveals that match funds yielded an investment of \$10.7M in addition to the sources of matching funds generated by the Blue Ridge National Heritage Area, Inc. Those sources include “cash match” funds (\$5.1M), in-kind investments (\$1.8M) and sub-grantee match funds (\$3.7M).

Fiscal Year	Cash Match	In-kind Investments	Match Funds Generated by BRNHA Sub-Grantees	Total Reported Match
2004-2005	\$311,147	\$101,175	\$171,348	\$583,670
2006	\$624,030	\$412,055	\$95,971	\$1,132,056
2007	\$517,272	\$313,536	\$204,196	\$1,035,004
2008	\$577,994	\$65,039	\$469,491	\$1,112,524
2009	\$587,773	\$232,741	\$370,198	\$1,190,712
2010	\$355,555	\$143,002	\$471,768	\$970,325
2011	\$374,365	\$35,882	\$458,869	\$869,116
2012	\$207,812	\$76,442	\$477,534	\$761,788
2013	\$387,173	\$37,255	\$280,696	\$705,124
2014	\$359,098	\$132,862	\$456,820	\$948,780
2015	\$418,114	\$142,616	\$146,088	\$706,818
2016	\$416,338	\$152,376	\$143,346	\$712,060

**Table 4.2: Matching Funds Reported to NPS**

Amounts included in the “cash match” figures involve two types of cash. The first is funding (cash) that BRNHA directly received and spent from other sources, (such as state and private sources), and second, cash spent by their partners in support of their program of work, but not flowing directly through BRNHA.

An example of the latter would be co-op advertising. There are three host group partners in BRNHA’s region which promote visitation to Western North Carolina through print, radio and web-based co-op advertising. The host groups, however, buy the ads directly from the providers with some funds provided by BRNHA and the balance of funds from other partners. Investments from other partners are considered a “cash match” based on federal match guidelines. Even though BRNHA funds might be pooled in, these “cash match” funds never pass through BRNHA accounts and are, therefore, not directly visible. They do, however, pay vendors and thus are considered “cash match.” (The “cash match” funds apply to funds that the partner obtained from sources other than BRNHA. Since BRNHA only provided a portion of the funds for this purpose, the partners obtained funds from other sources. Those additional funds were considered to be “cash match” since BRNHA did not provide them.)

Since Blue Ridge National Heritage, Inc. is a coordinating entity organized as a not-for-profit corporation, it has the opportunity to award grants to local organizations which

can make contributions to various BRNHA programs in order to provide benefits to their local communities.

As a condition for receiving grants, recipients are required to generate non-federal matching funds. As shown in Table 4.2, sub-grantee matching funds are the second largest source of match and amounted to \$3.7 M.

Table 4.3 below shows the extent of matching funds and the match ratio for BRNHA over the course of its operations between 2004 and 2016. The match ratio is calculated as the ratio of NPS/NHA funds to the total investment in the NHA project. The key requirement is that the National Park Service cannot contribute more than 50% of the NHA program costs. Thus, the ratio must be .50 or less. As the table below reveals, BRNHA has met or exceeded the 50% match commitment for every year since its founding except for one year - FY2013. In that year, the match was slightly short of its 50% requirement by \$41,237 or 5.5%.

Since match is actually counted over multiple years, ARC-Bridge does not view this as a program detriment. In fact, the following year (FY2014), BRNHA more than made up for the shortfall. **In addition, on an overall basis, ARC-Bridge has found that BRNHA exceeded its 50% match requirement by generating \$10.7M in matching funds relative to the NPS contribution of \$8.7M - nearly \$2 million over its required match.**

Fiscal Year	NPS/NHA funds	Total Reported Match (Non-Federal)	Total Investment in BR-NHA Projects	Match Ratio
2004-2005	\$434,395	\$583,670	\$1,018,065	0.43
2006	\$590,801	\$1,132,056	\$1,745,242	0.34
2007	\$984,894	\$1,035,004	\$2,019,898	0.49
2008	\$709,857	\$1,112,524	\$1,822,381	0.39
2009	\$863,366	\$1,190,712	\$2,054,078	0.42
2010	\$803,710	\$970,325	\$1,774,035	0.45
2011	\$663,482	\$869,116	\$1,532,598	0.43
2012	\$760,185	\$761,788	\$1,521,973	0.5
2013	\$746,361	\$705,124	\$1,451,485	0.51
2014	\$844,797	\$948,780	\$1,793,577	0.47
2015	\$705,684	\$706,818	\$1,412,302	0.5
2016	\$598,425	\$712,060	\$1,310,485	0.46
<b>Total</b>	<b>\$8,705,957</b>	<b>\$10,727,977</b>	<b>\$19,433,934</b>	<b>0.45</b>

**Table 4.3: NPS and Matching Funds by NPS Award Year**

### 4.1.2 Leveraged Funds

Leveraged funds are meant to include all funds generated by the operating entity during a given year that the entity would not have had were it not for the Heritage Program funding.

These funds can include monies provided by other federal agencies and any matched funds associated with federal grants. Leveraged funds for BRNHA are shown in Table 4.4.

Fiscal Year	Cash Match	In-Kind Match	Sub-Grantee Match	Other Federal Grants (Non-NPS)	Federal Match from Sub-Grantees	Match on Other Federal Grants & Projects (Non-NPS)	Total Leveraged Funds	NPS \$	Total NPS Leverage \$	Ratio
FY2004 and FY2005	\$311,147	\$101,175	\$171,348				\$583,670	\$434,395	\$1,018,065	1.344
FY2006	\$624,030	\$412,055	\$95,971	\$22,385			\$1,154,441	\$590,801	\$1,745,242	1.954
FY2007	\$517,272	\$313,536	\$204,196				\$1,035,004	\$984,894	\$2,019,898	1.051
FY2008	\$577,994	\$65,039	\$469,491				\$1,112,524	\$709,857	\$1,822,381	1.567
FY2009	\$587,773	\$232,741	\$370,198				\$1,190,712	\$863,366	\$2,054,078	1.379
FY2010	\$355,555	\$143,002	\$471,768				\$970,325	\$803,710	\$1,774,035	1.207
FY2011	\$374,365	\$35,882	\$458,869	\$3,744		\$936	\$873,796	\$663,482	\$1,537,278	1.317
FY2012	\$207,812	\$76,442	\$477,534	\$10,582		\$202,646	\$975,016	\$760,185	\$1,735,201	1.283
FY2013	\$387,173	\$37,255	\$280,696	\$39,859		\$22,485	\$767,448	\$746,361	\$1,513,809	1.028
FY2014	\$359,098	\$132,862	\$456,820	\$36,209	\$254,000	\$29,052	\$1,268,041	\$844,797	\$2,112,838	1.501
FY2015	\$418,114	\$142,616	\$146,088	\$67,442		\$38,938	\$813,198	\$705,684	\$1,518,882	1.152
FY2016	\$416,338	\$152,376	\$143,346	\$194,583		\$71,792	\$978,435	\$598,425	\$1,576,860	1.635
<b>Total</b>	<b>\$5,136,671</b>	<b>\$1,844,981</b>	<b>\$3,746,325</b>	<b>\$374,804</b>	<b>\$254,000</b>	<b>\$365,829</b>	<b>\$11,722,610</b>	<b>\$8,705,957</b>	<b>\$20,432,567</b>	<b>1.347</b>

**Table 4.4 Leveraged Funds by Year**

As Table 4.4 indicates, the existence of NHA funds from the National Park Service provides considerable leverage in terms of BRNHA's ability to raise additional monies. Thus between 2004 and 2016, the National Park Service invested \$8.7M. As a result of having those funds, the Blue Ridge National Heritage Area has been able to raise an additional \$11.7M to support the program. As the table indicates, this leverage ratio is 135% of the amount that the NPS has invested directly. Clearly, NPS/NHA funds have enabled solid leverage for BRNHA.

## 4.2 Use of Financial Resources

BRNHA receives funding from the National Park Service, other federal agencies, state and local organizations, as well as grants from foundations. Table 4.5 provides a breakdown by fiscal year between management/operating expenditures and program expenditures. The percentage of operating expenditures to total expenditures from 2004 through 2016 ranges from a high of 22% to a low of 12%, with an average over all fiscal years of 17%.

Fiscal Year	Management/Operating Expenses	Program Expenses	Total Expenses	% of Management/Operating Expense
2004	\$12,290	\$42,530	\$54,820	0.22
2005	\$52,749	\$395,841	\$448,590	0.12
2006	\$82,781	\$452,066	\$534,847	0.15
2007	\$164,093	\$1,047,701	\$1,211,794	0.14
2008	\$160,658	\$916,050	\$1,076,708	0.15
2009	\$149,522	\$870,527	\$1,020,049	0.15
2010	\$133,824	\$727,509	\$861,333	0.16
2011	\$127,054	\$585,285	\$712,339	0.18
2012	\$133,215	\$690,196	\$823,411	0.16
2013	\$149,726	\$715,988	\$865,714	0.17
2014	\$198,854	\$810,697	\$1,009,551	0.2
2015	\$170,762	\$758,434	\$929,196	0.18
2016	\$205,006	\$747,223	\$952,229	0.22
<b>Total</b>	<b>\$1,740,534</b>	<b>\$8,760,047</b>	<b>\$10,500,581</b>	<b>0.17</b>

**Table 4.5: Management/Operating vs. Program Expenses by Fiscal Year**

Activities	FY14	FY15	FY16	Total	% by Activity
<b>Sub-Grants</b>					15%
NPS/NHA \$	\$234,817	\$95,284	\$106,722	\$436,823	
Other \$	-	-	-	-	
<b>Marketing</b>					16%
NPS/NHA \$	\$143,957	\$151,089	\$101,872	\$396,918	
Other \$	\$30,948	\$2,525	\$43,744	\$77,217	
<b>BR Music Trails</b>					16%
NPS/NHA \$	\$106,865	\$114,040	\$90,692	\$311,597	
Other \$	\$66,121	\$45,117	\$34,883	\$146,121	
<b>BR Heritage Trail</b>					19%
NPS/NHA \$	\$70,969	\$69,924	\$29,942	\$170,835	
Other \$	\$38,129	\$128,679	\$198,186	\$364,994	
<b>Visitor Services &amp; Group Tours</b>					14%
NPS/NHA \$	\$112,097	\$115,907	\$102,444	\$330,448	
Other \$	\$6,794	\$35,869	\$38,738	\$81,401	
<b>Management/Operating</b>					20%
NPS/NHA \$	\$194,418	\$162,995	\$188,932	\$546,345	
Other \$	\$4,436	\$7,767	\$16,074	\$28,277	
<b>TOTAL</b>					100%
NPS/NHA \$	\$863,123	\$709,239	\$620,604	\$2,192,966	
Other \$	\$146,428	\$219,957	\$331,625	\$698,010	
	\$1,009,551	\$929,196	\$952,229	\$2,890,976	
NPS/NHA %	85%	76%	65%	76%	
Other %	15%	24%	35%	24%	

**Table 4.6: Expenditures by Program Activity By Funding Source for Representative Years FY14-FY16**

BRNHA programming activities have varied substantially across its 13 year history. In order to understand how BRNHA allocated its funds across various programs and operational areas, expenditure data by activity for the last three fiscal years (FY2014-2016) was provided to ARCBridge as the best representation of current BRNHA programming.

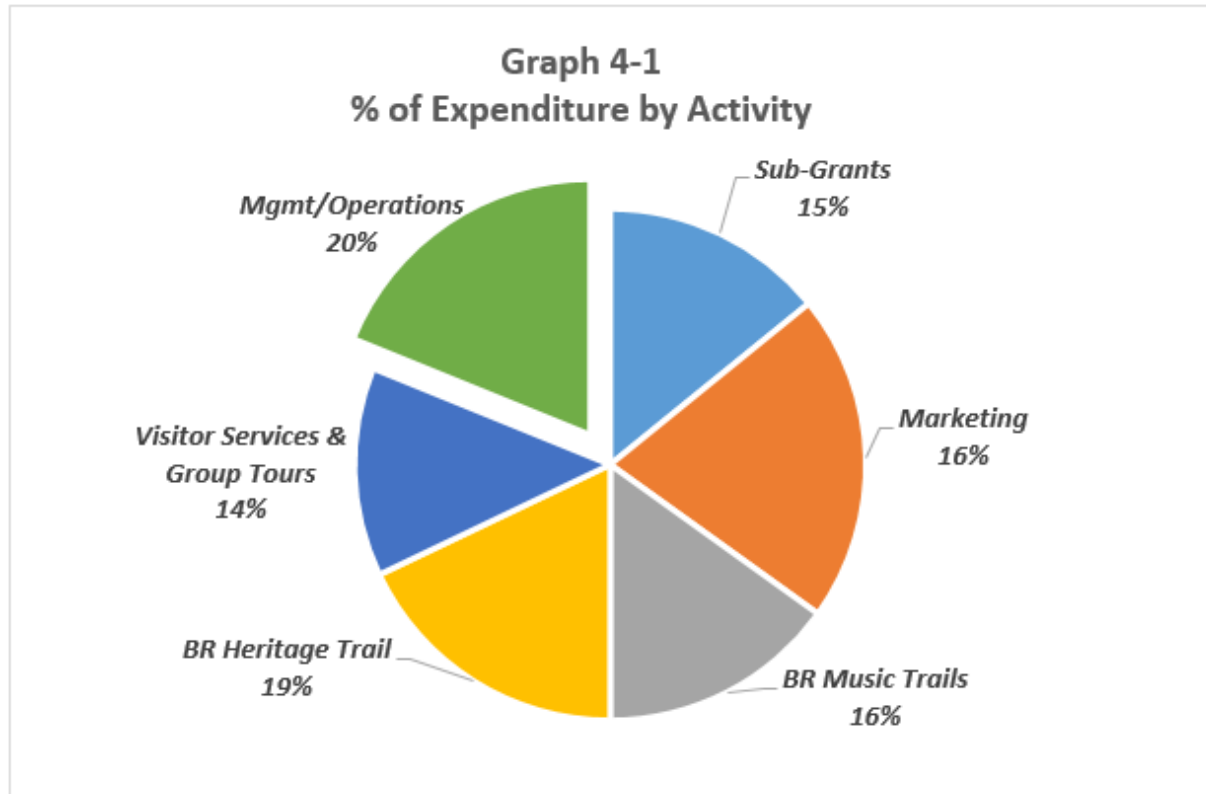
Table 4.6 reveals that expenditures for FY14 through FY16 comprised nearly \$2.2 Million in National Park Service funds and approximately \$700,000 from other sources.

Total expenditures for these three years amounted to approximately \$2.9million.

Of these funds, 76% were NPS/NHA funds and 24% came from other sources. The table shows the sub-grant program accounted for 15% of the funds, marketing accounted for 16% of the expenditures, the Music Trails accounted for 16% of the expenditures, the Blue Ridge Heritage Trail was the focus of 19% of the expenditures and Visitor Services (i.e. the Visitor Center), and group tours accounted for 20% of the expenditures.

These results are illustrated in Graph 4.1 below.

The graph also shows that Management and Operations took up 20% of the expenditure.



#### 4.2.1 Operational vs. Program Expenditures

It should be noted that BRNHA's definition of programmatic expenditures included marketing (because marketing was directed at specific programs rather than at the BRNHA program as a whole) as well as support for the Blue Ridge Parkway Visitor Center (which is focused on support for programs and outreach to visitors for information regarding particular program sites, and is outlined in a memorandum of understanding and annual work plan with the Blue Ridge Parkway).

In addition, expenditures for sub-grants and other investments in different programs were included in the programmatic category. In line with this definition, operational expenditures accounted for 20% of total expenditures for FY14 through FY16 while program expenditures reflected 80% of the total expenditures. These data are shown below in Table 4.7.

Area	FY14	FY15	FY16	Total	%
<b>Management/Operations</b>	\$198,854	\$170,762	\$205,006	\$574,622	20%
<b>Programs</b>	\$810,697	\$758,434	\$747,223	\$2,316,354	80%
<b>Total</b>	\$1,009,551	\$929,196	\$952,229	\$2,890,976	

**Table 4.7: Operational vs. Program Expenditures**



### 4.3 Impact of Investments

It is clear from this report that the investments made by BRNHA are in line with the mandate found in the Congressional legislation establishing the Heritage Area.

On an overall basis (between 2004 and 2016), BRNHA exceeded its 50% target by just over \$2M. **In total, the Heritage Area matched NPS federal funds with a match rate of 55%.** In effect, the contribution of the National Park Service was therefore only 45% rather than 50% of the total funds raised.

ARCBridge's analysis of matching funds indicates that the National Park Service/NHA has provided \$8.7 million between 2004 and 2016. Since BRNHA has generated \$11.7M in total leveraged funds, this yields a leverage ratio of 1.347. Other federal agencies contributed approximately \$375,000, while non-federal sources contributed \$10.7 million. Clearly, the Heritage Area has managed to leverage the NPS/NHA funds in a substantially larger amount to fund its programs across the area.

## Section 5 – BRNHA Sustainability

### 5.1 Defining Sustainability

The third question guiding the evaluation, derived from legislation (P.L. 110-229), asks, “How do the coordinating entity’s management structure, partnership relationships, and current funding contribute to the NHA’s sustainability?” To guide the assessment of sustainability, ARCBridge has adopted the definition developed by NPS with the assistance of stakeholders from a number of National Heritage Areas. Sustainability for an NHA is as follows as per NPS:

“...the National Heritage Area coordinating entity’s continuing ability to work collaboratively and reciprocally with federal, state, community, and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation and economic development of nationally significant resources.”

Critical components of sustainability for a National Heritage Area include, but are not limited to:

- The coordinating entity and NPS honoring the legislative mandate of the NHA
- The coordinating entity’s management capacity, including governance, adaptive management (such as strategic planning), staffing, and operations
- Financial planning and preparedness including the ongoing ability to leverage resources in support of the local network of partners
- Partnerships with diverse community stakeholders, with the heritage area serving as a hub, catalyst, and/or coordinating entity for ongoing capacity building, communication, and collaboration among local entities
- Program and project stewardship, where the combined investment results in the improved economic value and ultimately long-term quality of life of that region
- Outreach and marketing to engage a full and diverse range of audiences

In the following sections, ARCBridge addresses each of these components, drawing on data provided in previous sections.

### 5.2 Honoring the Legislative Mandate of BRNHA

The Blue Ridge National Heritage Area Act of 2003 has specified that it is in the interest of the United States to preserve and interpret the cultural and historical resources of the Blue Ridge Mountains for the education and benefit of present and future generations. The purpose of the National Heritage Area is "to foster a close working relationship with, and to assist all levels of government, the private sector, and local communities in the State of North Carolina in managing, preserving, protecting, and interpreting the cultural, historical, and natural resources of the Blue Ridge region while continuing to develop economic opportunities".

**ARCBridge analysis in Sections 2 and 3 in this report has concluded that BRNHA has developed a strong working relationship with multiple levels of government in Western North Carolina including:**

- The National Park Service, as embodied in the management and staff of the Blue Ridge Parkway and the Great Smoky Mountains National Parks
- The North Carolina Arts Council (a state agency), in expansion of cultural tourism in North Carolina with the fundamental idea being to highlight important elements of North Carolina history and heritage
- Multiple small towns in the region, including:
  - City of Mount Airy
  - Town of Hot Springs
  - Bethel community
  - Town of Sparta
  - Town of Marshall
  - Town of Hayesville
  - Town of Sylva
  - Town of Valdese
  - Town of Cherokee

The National Heritage Area has also engaged with private sector entities to further its mission. These includes such entities as:

- The Biltmore Center for Professional Development, which has partnered with BRNHA to provide a Hospitality Training program for local businesses to improve their tourism operations (e.g., hotels, music venues, restaurants, retail outlets, and museums)
- Harrah's Cherokee Casino Hotel, which has partnered with BRNHA to bring dynamic issue-focused, heritage-centered keynote speakers to BRNHA's Annual Meeting
- Duke Energy

As described above, the assistance provided by BRNHA to private institutions, local communities, and state agencies is to preserve, protect, interpret and develop the cultural, historic and natural assets of the Blue Ridge Area. Section 3 of this report describes in detail the efforts initiated by BRNHA to accomplish those elements of its mission.

## 5.3 BRNHA Management Capacity

### 5.3.1 Governance, Leadership, and Oversight

The key to assessing BRNHA's management capacity rests on the performance of the board of directors, BRNHA's Executive Director and the staff members in the organization.

#### Board Members

BRNHA's Board of Directors consists of a diverse group of seven individuals whose backgrounds encompass fundraising, economic development, higher education, non-profit management, traditional music, Cherokee culture, African American history regional tourism, and historic preservation. Members of the board have at least five years of experience with BRNHA. The background and portfolios of board members are shown in Table 5.1 on the following page.

As displayed in Table 5.1, the members of the board of directors have taken on considerable management responsibilities along the lines of audits, resource development (including fundraising) interpretation activities, marketing and communications, and grants management.

The skill sets reflected in the board membership represent a diverse array of talents that are directly related to key areas of BRNHA objectives, including travel and tourism, non-profit management, fundraising, preservation, and academic pursuits related to education and interpretation.

### 5.3.2 Staffing and Operations

BRNHA staff are well suited to the tasks confronting the National Heritage Area. The current Executive Director, Angie Chandler, came to BRNHA from the North Carolina Arboretum and served as President of the Blue Ridge Parkway Association. Because of this experience, she is knowledgeable regarding Blue Ridge Parkway facilities and operations, the National Park Service, and the local community in Western North Carolina. Her background includes 22 years working on marketing issues and governmental affairs at the federal, state and local levels.

The current BRNHA staff also includes Rob Bell, Senior Director of Programs. Rob is skilled in internal operations, program planning, and research. Kathy Neall is the financial manager and brings proficiency in financial management and operations management to the team.

### 5.3.3 Strategic Planning and Adaptive Management

In specific terms, the BRNHA Board of Directors has a long history of active involvement in planning activities such as:

- Preparation of the NHA Management Plan (2008-2018)
- Development of the BRNHA Partnership Strategic Plan (2011-2016) adopted in 2011
- Analysis of progress to date (2013) on the BRNHA Strategic Plan
- Development of several marketing and communications plans for BRNHA
- Taking initiative to establish the Blue Ridge Music Trails and other trail themes (such as the Heritage and Craft Trails)

One of the most challenging periods for the organization occurred when the State of North Carolina substantially reduced its funding from a high of \$247,000 in 2008 to \$3,300 in 2010. This was due to the recession beginning in 2009. In response to this situation, the board embarked on the development of BRNHA's Strategic Plan (approved in 2011) which focused on the development of "Trails" (including the Music Trails and the Heritage Trail).

The board also concentrated its efforts on fundraising and on development of partnerships. These efforts resulted in sustained funding match levels in excess of 50% and substantial partner development since 2009.

BRNHA Board Members	Time Involved	Officer	Task Force/Committees	Expertise
<b>Connie Haire</b>	Board member since 2011 (6 years)	Board Chair /past Treasurer	Audit Committee/ Resource Development Committee	Fundraising, Economic Development, Higher Ed
<b>Becky Anderson</b>	Involved in BRNHA concept since the mid 1990s and played a key role in designation. Board member since 2003 (14 years)	Treasurer/past BRNHA Chair and Co-Founder	Audit and Resource Development Committee, Marketing Committee, Grants Committee	Place-Based Rural Community and Economic Development, Culture and Craft, Nonprofits, Fundraising
<b>Karen Paar</b>	Board member since 2011 (6 years)	Past Chair, past Vice Chair	Grants Committee, Resource Development Committee, and Interpretation Committee	Higher Education, History and Archives, Traditional Music
<b>Bobby Raines</b>	Board member since 2012 (5 years)	Vice Chair, past Secretary	Resource Development Committee	Eastern Band Cherokee Indians member, Nonprofit Leader and Funder, Cherokee Culture
<b>Cathy Robbins</b>	Board member since 2007 (10 years)	Past Chair, past Vice Chair, Appointed by N.C. Governor	Marketing/ Communications Committee Chair	Tourism connection - owns major attraction, formerly with Banking Industry
<b>Millie Barbee</b>	Board member since 2011 (6 years)	Appointed by N.C. Governor	Grants Committee Chair	Regional Tourism, Historic Preservation, Conservation and Downtown Development
<b>Darin Waters</b>	Board member since 2011 (6 years)	Secretary	Interpretation Committee	African American History, Higher Education, Economic Development

Table 5.1: Experience and Portfolios of BRNHA Board Members

As discussed in Section 2 of this report, partnerships have played a significant role in and fueled the growth of the Heritage Area. As also noted in Section 2, most of the partners developed by BRNHA are still actively engaged with various programs.

The BRNHA Marketing Committee has carried out detailed planning for marketing and outreach to enhance tourism in the Heritage Area since 2006. These efforts have continued to help guide the organization at least through 2016.

### 5.3.4 Monitoring and Record Keeping

**BRNHA keeps consistent records across the years and makes changes to reflect the evolving requirements set forth by the National Park Service. The financial record keeping appears to be in strong and stable condition.** The only gap in financial record keeping was during 2004-2005, at the very beginning of the program, when there was no standard financial reporting protocol required by NPS. For this reason, financial reporting from that two-year period is treated as a single reporting period (i.e., as FY2004 - FY2005 rather than as separate fiscal years).

**ARCBridge believes that the area of partnership record keeping requires some additional investment and improvement.** When ARCBridge attempted to develop an integrated picture of 14 years of Blue Ridge partnerships, the team found that the data were duplicative and needed to be de-duplicated in order to develop an accurate picture of the total number of partners, the rate of new partner development, and partner activity. **As part of this project, ARCBridge has worked with the BRNHA team to successfully refine its partner data.**

While ARCBridge recommends that BRNHA continue to track partner activity more carefully in the future, it should be noted **that there have been no guidelines or requirements established by the National Park Service to track such information.** In the future, if such information is carefully maintained by BRNHA, the organization will be better able to determine how rapidly they are able to attract new partners and to examine the role and value that each partner plays in their program offerings. **Problems in the existing partner data set have not had an adverse impact on current program planning or operations.**

## 5.4 Partnerships

A key element of NHA sustainability is the development of partnerships with a diverse set of community stakeholders which can support ongoing capacity development across the community. In Section 2 of this report ARCBridge documented the large number of formal and informal partners (N=1,161) developed by BRNHA between 2003 and 2016.

Significant progress in partnership development occurred following the completion of the 2008 management plan by the board of directors. In fact, 45% of partners became engaged with the NHA during or after 2008. These partner estimates may not match those reported to the National Park Service. The partner figures identified here include individual members (such as artists) and not just organizations. In fact, the data indicates that of the 1,161 partners, 386 or 33% were individual artists who were listed in the artist directory.

**In section 2 ARCBridge also observed that more than 56% of all of BRNHA's partners were active for more than five years. This is an indication that the NHA has managed to build strong and lasting relationships with its partners, who tend to continue their engagement over significant periods of time.**

## 5.5 Financial Sustainability, Importance of NPS/NHA funds, and Importance of NHA Designation

Table 5.2 shows the total investments and expenditures of BRNHA from the program's beginning (FY2004) through FY2016. The data shows that total expenditure during the period amounted to \$10.5M while the total revenue directly received by BRNHA amounted to nearly \$10.65M. Because revenues exceed expenditures, BRNHA has a small pool of retained earnings approaching \$150,000.

This data also shows that NPS/NHA funds have been in decline for the past several years since 2009 through the present day.

As described in Section 4 of this report, the total reported "match" funds generated by BRNHA and its sub-grantees was \$10.7M and actually exceeded the funds provided by the National Park Service.

Fiscal Year	NPS/NHA funds	Other Federal Funds (Non-NPS)	Non-Federal Funds	Total Revenue	Total Expenditures
2004-05	\$434,395		\$87,457	\$521,852	\$503,410
2006	\$590,801	\$22,385	\$18,860	\$632,046	\$534,847
2007	\$984,894		\$171,295	\$1,156,189	\$1,211,794
2008	\$709,857		\$354,007	\$1,063,864	\$1,076,708
2009	\$863,366		\$178,034	\$1,041,400	\$1,020,049
2010	\$803,710		\$74,837	\$878,547	\$861,333
2011	\$663,482	\$3,744	\$21,630	\$688,856	\$712,339
2012	\$760,185	\$10,582	\$25,758	\$796,525	\$823,411
2013	\$746,361	\$39,859	\$65,361	\$851,581	\$865,714
2014	\$844,797	\$36,209	\$130,535	\$1,011,541	\$1,009,551
2015	\$705,684	\$67,442	\$204,272	\$977,398	\$929,196
2016	\$598,425	\$194,583	\$232,374	\$1,025,382	\$952,229
<b>Total</b>	<b>\$8,705,957</b>	<b>\$374,804</b>	<b>\$1,564,420</b>	<b>\$10,645,181</b>	<b>\$10,500,581</b>

**Table 5.2: NPS/NHA funds, Other Federal Funds, Non-Federal Funds Received, Total Investment and Total Expenditures by Year in US Dollars**

**These results suggest that BRNHA has strong capability in fundraising and appears to have the potential to meet shortfalls due to declining NPS investments.** As part of planning for future fundraising, BRNHA has retained a consulting firm to improve its sustainability. The funding for retaining the consultant has been provided by the Cherokee Preservation Foundation. The mission of this new program is to supplement funding from a variety of sources. These include:

- The development of a sponsorship plan to enable the Blue Ridge Music Trails and the Craft Trails to become self sustaining
- The development of a philanthropy and endowment plan combined with social media assets to build a broader base of financial support from individuals and institutions
- Development through corporate giving and not-for-profit grant programs

While BRNHA has shown itself to be adept at raising funds to fill gaps in support from state and federal sources, this new development will seek funds from other, identifiable, but as yet untapped sources.

Throughout the evaluation, the ARCBridge team raised the key question as to “what would happen if the National Park Service were to no longer provide support for the Blue Ridge National Heritage Area?” **While BRNHA has achieved sustainability, ARCBridge has found that funding cuts would still be detrimental because of the resulting loss of continuity, leadership, relationships, and trust that individual staffers have developed across the region.** Through various interviews, ARCBridge has understood that **dozens of organizational partners call BRNHA staffers regularly each week for support (e.g. technical questions, brainstorming support, or to be connected with a resource.) This is part of the "people" quotient that would be lost as a resource.**

While BRNHA partners could not identify any single source of funding that could replace federal support, they acknowledged that BRNHA has developed a regional support structure that had not previously existed. **In effect, BRNHA has created the “glue” which binds all of the partners together into a regionally focused organization.**

**ARCBridge believes that the loss of federal NPS/NHA funds would have a significant and deleterious effect on the region.** Specifically, the loss of federal funds would have the following effects:

- The ability of small organizations and small towns to initiate new heritage type programs would be hampered
- Support for existing programs would be diminished and their viability reduced
- There would be a reduction in the role of BRNHA thereby limiting funding for the marketing and branding efforts that have helped the area to improve the flow of tourism and economic development in the region
- It would make it exceedingly difficult for existing BRNHA partner organizations to maintain regional interconnections and would lead to fragmentation of programming
- There would be no connection between existing programs and projects and the national heritage movement and its links to American history and culture

ARCBridge believes funding cuts would be devastating to the Blue Ridge Parkway because of BRNHA's role in staffing and day to day operations. Because NPS rangers and Eastern National staff rotate to different locations along the parkway, BRNHA provides the only consistent staff in the NPS Visitor Center facility seven days a week.

ARCBridge has noted the immense hands-on nature of BRNHA's role in creating its three signature products - the Blue Ridge Music Trails, Heritage Trail, and Crafts Trails. These involve hundreds of sites and partners. Since BRNHA is the only organization with boots on the ground and resources to coordinate and oversee all the various operations on a day to day level, ARCBridge believes these signature products would lose leadership and essentially cease to exist if funding were to be cut, or in the case of the new Crafts Trail, never even get off the ground.

## 5.6 Sustainability Summary

ARCBridge's analysis of BRNHA sustainability suggests that the organization has a number of key elements that contribute long term capability for sustaining their financial position:

1. BRNHA has a strong board of directors and staff that have shown their capability for fundraising needed to fill gaps in financing from both state and federal sources. The board has been heavily involved in planning activities on behalf of the organization and has shown itself to be adept at managing through difficult periods of limited funding.

The board has also been proactive at identifying strategies that will serve the organization over the long term (e.g., including establishing the primacy of partnership development as a strategic initiative).

2. The organization has broadly developed a large group of partners (totaling 1,161), many of whom have been associated with BRNHA for a number of years. This base of partners offers the potential for numerous avenues for long term fundraising and voluntary support.

3. BRNHA has assumed a forward looking approach to fundraising by engaging a consultant to establish a new framework for financial development. This forward looking approach is, itself, being funded by a foundation grant. Such a future oriented approach is focused on a) grants and corporate giving, b) philanthropy and endowments from individuals and c) sponsorship of ongoing programs as a means of a self-sustaining base.

4. The BRNHA Marketing Committee has, since 2006, planned and invested in outreach and marketing programs designed to stimulate tourism both regionally and nationally. This planning was supported by outside consulting expertise provided by the Alpha Group and Magellan Strategy Group. Illustrative of these efforts have been investments in the following program elements:

- Content on the State of North Carolina's website
- A hospitality training program for tourism businesses making use of the expertise of the Biltmore Company
- BRNHA branded merchandise
- Radio advertising
- Co-op advertising
- WNC Magazine/WMCW "Living Traditions" Program
- Speakers' Bureau
- Development and printing of Welcome Center brochures, trail maps and trail guidelines
- In-region publicity campaigns for BRNHA and the Blue Ridge Music Trails

ARCBridge concludes that these four key elements - a strong board of directors, a network of hundreds of strong and active partners, innovative fundraising strategies, and integrated branding to promote regional tourism - will continue to contribute to successful BRNHA sustainability. The existence of this comprehensive set of marketing materials and programs provides evidence of BRNHA's ability to continue to successfully communicate its work in the region and indicates that the organization has a platform for continuing its outreach and marketing efforts well into the future.

## Appendix 1 - Evaluation Legislation

Excerpt(s) from Public Law 113-291

113th Congress

An Act

To authorize appropriations for fiscal year 2015 for military activities of the Department of Defense, for military construction, and for defense activities of the Department of Energy, to prescribe military personnel strengths for such fiscal year, and for other purposes . <<NOTE: Dec . 19, 2014 - [H .R . 3979]>>

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled, <<NOTE: Carl Levin and Howard P . ``Buck'' McKeon National Defense Authorization Act for Fiscal Year 2015 .>>  
SECTION 1 . SHORT TITLE .

(a) Short Title .--This Act may be cited as the ``Carl Levin and Howard P . ``Buck'' McKeon National Defense Authorization Act for Fiscal Year 2015'' .

[ ...]

SEC . 3052 . NATIONAL HERITAGE AREAS AND CORRIDORS

(a) Extension of National Heritage Area Authorities .- (1) Extensions .- (A) Section 12 of Public Law 100-692 (16 U .S .C . 461 note; 102 Stat . 4558; 112 Stat . 3258; 123 Stat . 1292; 127 Stat . 420; 128 Stat . 314) <<NOTE: 54 USC 320101 note .>> is amended- (i) in subsection (c)(1), by striking ``2015'' and inserting ``2021''; and (ii) in subsection (d), by striking ``2015'' and inserting ``2021'' .

(B) Division II of Public Law 104-333 (16 U .S .C . 461 note) <<NOTE: 54 USC 320101 note .>> is amended by striking ``2015'' each place it appears in the following sections and inserting ``2021'' : (i) Section 107 (110 Stat . 4244; 127 Stat . 420; 128 Stat . 314) . (ii) Section 408 (110 Stat . 4256; 127 Stat . 420; 128 Stat . 314) . (iii) Section 507 (110 Stat . 4260; 127 Stat . 420; 128 Stat . 314) . (iv) Section 707 (110 Stat . 4267; 127 Stat . 420; 128 Stat . 314) . (v) Section 809 (110 Stat . 4275; 122 Stat . 826; 127 Stat . 420; 128 Stat . 314) . (vi) Section 910 (110 Stat . 4281; 127 Stat . 420; 128 Stat . 314) . (C) Section 109 of Public Law 105-355 (16 U .S .C . 461 note; 112 Stat . 3252) <<NOTE: 54 USC 320101 note .>> is amended by striking ``September 30, 2014'' and inserting September 30, 2021'' . (D) Public Law 106-278 <<NOTE: 54 USC 320101 note .>>

.>> (16 U .S .C . 461 note) is amended- (i) in section 108 (114 Stat . 818; 127 Stat . 420; 128 Stat . 314), by striking 2``015'' and inserting 2``021''; and (ii) in section 209 (114 Stat . 824), by striking ``the date that is 15 years after the date of enactment of this title'' and inserting ``September 30, 2021'' . (E) Section 157(i) of Public Law 106-291 (16 U .S .C . 461 note; 114 Stat . 967) <<NOTE: 54 USC 320101 note .>> is amended by striking 2``015'' and 2``021'' . (F) Section 7 of Public Law 106-319 (16 U .S .C . 461 note; 114 Stat . 1284) <<NOTE: 54 USC 320101 note .>> is amended by striking 2``015'' and inserting 2``021'' . (G) Title VIII of division B of H .R . 5666 (Appendix D) as enacted into law by section 1(a)(4) of Public Law 106-554 (16 U .S .C . 461 note; 114 Stat . 2763, 2763A-295; 123 Stat . 1294) <<NOTE: 54 USC 320101 note .>> is amended- (i) in section 804(j), by striking ``the day occurring 15 years after the date of enactment of this

Blue Ridge National Heritage Area Evaluation Findings

Appendix 1– Evaluation Legislation

title'' and inserting ``September 30, 2021''; and (ii) by adding at the end the following: ``SEC . 811 . TERMINATION OF ASSISTANCE . ``The authority of the Secretary to provide financial assistance under this title shall terminate on September 30, 2021 .'' . (H) Section 106(b) of Public Law 103-449 (16 U .S .C . 461 note; 108 Stat . 4755; 113 Stat . 1726; <<NOTE: 54 USC 320101 note .>> 123 Stat . 1291) is amended, by striking ``2015'' and inserting ``2021'' . (2) <<NOTE: 54 USC 320101 note .>> Conditional extension of authorities .- (A) In general .--The amendments made by paragraph (1) (other than the amendments made by clauses (iii) and (iv) of paragraph (1)(B)), shall apply only through September 30, 2020, unless the Secretary of the Interior (referred to in this section as the ``Secretary'')- (i) conducts an evaluation of the accomplishments of the national heritage areas extended under paragraph (1), in accordance with subparagraph (B); and (ii) prepares a report in accordance with subparagraph (C) that recommends a future role for the National Park Service with respect to the applicable national heritage area . (B) Evaluation . .--An evaluation conducted under subparagraph (A)(i) shall- (i) assess the progress of the local management entity with respect to- (I) accomplishing the purposes of the authorizing legislation for the national heritage area; and



(II) achieving the goals and objectives of the approved management plan for the national heritage area; (ii) analyze the investments of Federal, State, tribal, and local government and private entities in each national heritage area to determine the impact of the investments; and (iii) review the management structure, partnership relationships, and funding of the national heritage area for purposes of identifying the critical components for sustainability of the national heritage area. (C) Report.--Based on the evaluation conducted under subparagraph (A)(i), the Secretary shall submit to the Committee on Energy and Natural Resources of the Senate and the Committee on Natural Resources of the House of Representatives a report that includes recommendations for the future role of the National Park Service with respect to the national heritage area.

[ ... ]

(c) National Heritage Area Redesignations .- (1) Redesignation of the last green valley national heritage corridor .- (A) In general .--The Quinebaug and Shetucket Rivers Valley National Heritage Corridor Act of 1994 (16 U .S .C . 461 note; Public Law 103-449) <<NOTE: 54 USC 320101 note .>> is amended- (i) in section 103- (I) in the heading, by striking “quinebaug and shetucket rivers valley national heritage corridor” and inserting “last green valley national heritage corridor”; and (II) in subsection (a), by striking “the Quinebaug and Shetucket Rivers Valley National Heritage Corridor” and inserting “The Last Green Valley National Heritage Corridor”; and (ii) in section 108(2), by striking “the Quinebaug and Shetucket Rivers Valley National Heritage Corridor under” and inserting “The Last Green Valley National Heritage Corridor established by” .

. (B) References .--Any reference in a law, map, regulation, document, paper, or other record of the United States to the Quinebaug and Shetucket Rivers Valley National Heritage Corridor shall be deemed to be a reference to the “The Last Green Valley National Heritage Corridor” . (2) Redesignation of motorcities national heritage area .- (A) In general .--The Automobile National Heritage Area Act of 1998 (16 U .S .C . 461 note; Public Law 105-355) <<NOTE: 54 USC 320101 note .>> is amended- (i) in section 102- (I) in subsection (a)- (aa) in paragraph (7), by striking “Automobile National Heritage Area Partnership” and inserting “MotorCities National Heritage Area Partnership”; and

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(bb) in paragraph (8), by striking “Automobile National Heritage Area” each place it appears and inserting “MotorCities National Heritage Area”; and (II) in subsection (b)- (aa) in the matter preceding paragraph (1), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; and (bb) in paragraph (2), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; (ii) in section 103- (I) in paragraph (2), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; and (II) in paragraph (3), by striking “Automobile National Heritage Area Partnership” and inserting “MotorCities National Heritage Area Partnership”; (iii) in section 104- (I) in the heading, by striking “automobile national heritage area” and inserting “motorcities national heritage area”; and (II) in subsection (a), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; and (iv) in section 106, in the heading, by striking “automobile national heritage area partnership” and inserting “motorcities national heritage area partnership” .

(B) References .--Any reference in a law, map, regulation, document, paper, or other record of the United States to the Automobile National Heritage Area shall be deemed to be a reference to the “MotorCities National Heritage Area” .

Approved December 19, 2014 .

LEGISLATIVE HISTORY--H .R . 3979:

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HOUSE REPORTS: No . 113-360 (Comm . on Ways and Means) .

CONGRESSIONAL RECORD, Vol . 160 (2014):

Mar . 11, considered and passed House .

Mar . 31, Apr . 1-3, 7, considered and passed Senate, amended .

Dec . 4, House concurred in Senate amendment with an amendment .

Dec . 12, Senate concurred in House amendment

## Appendix 2 - Legislation

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shall be based on recognized best practices for environmental sustainability and shall be reviewed periodically and revised as necessary. Development of the tract shall be limited to a road and utility corridor, an educational campus, and the infrastructure necessary to support such development. No new structures shall be constructed on the part of the Ravensford tract depicted as the “No New Construction” area on the map referred to in subsection (c)(3), which is generally the area north of the point where Big Cove Road crosses the Raven Fork River. All development on the Ravensford tract shall be conducted in a manner consistent with this section and such development standards.

(e) GAMING PROHIBITION.—Gaming as defined and regulated by the Indian Gaming Regulatory Act (25 U.S.C. 2701 et seq.) shall be prohibited on the Ravensford tract.

SEC. 139. Notwithstanding any implementation of the Department of the Interior’s trust reorganization plan within fiscal years 2003 or 2004, funds appropriated for fiscal year 2004 shall be available to the tribes within the California Tribal Trust Reform Consortium and to the Salt River Pima Maricopa Indian Community, the Confederated Salish-Kootenai Tribes of the Flathead Reservation and the Chippewa Cree Tribe of the Rocky Boys Reservation on the same basis as funds were distributed in fiscal year 2003. This Demonstration Project shall operate separate and apart from the Department of the Interior’s trust reform reorganization, and the Department shall not impose its trust management infrastructure upon or alter the existing trust resource management systems of the above referenced tribes having a self-governance compact and operating in accordance with the Tribal Self-Governance Program set forth in 25 U.S.C. Sections 458aa–458hh: *Provided*, That the California Trust Reform Consortium and any other participating tribe agree to carry out their responsibilities under the same fiduciary standards as those to which the Secretary of the Interior is held: *Provided further*, That they demonstrate to the satisfaction of the Secretary that they have the capability to do so.

SEC. 140. (a) SHORT TITLE.—This section may be cited as the “Blue Ridge National Heritage Area Act of 2003”.

(b) FINDINGS AND PURPOSE.—

(1) FINDINGS.—Congress finds that:

(A) The Blue Ridge Mountains and the extensive cultural and natural resources of the Blue Ridge Mountains have played a significant role in the history of the United States and the State of North Carolina.

(B) Archaeological evidence indicates that the Blue Ridge Mountains have been inhabited by humans since the last retreat of the glaciers, with the Native Americans living in the area at the time of European discovery being primarily of Cherokee descent.

(C) The Blue Ridge Mountains of western North Carolina, including the Great Smoky Mountains, played a unique and significant role in the establishment and development of the culture of the United States through several distinct legacies, including—

(i) the craft heritage that—

(I) was first influenced by the Cherokee Indians;

Blue Ridge  
National  
Heritage Area  
Act of 2003.  
16 USC 461 note.

(II) was the origin of the traditional craft movement starting in 1900 and the contemporary craft movement starting in the 1940's; and

(III) is carried out by over 4,000 craftspeople in the Blue Ridge Mountains of western North Carolina, the third largest concentration of such people in the United States;

(ii) a musical heritage comprised of distinctive instrumental and vocal traditions that—

(I) includes stringband music, bluegrass, ballad singing, blues, and sacred music;

(II) has received national recognition; and

(III) has made the region one of the richest repositories of traditional music and folklife in the United States;

(iii) the Cherokee heritage—

(I) dating back thousands of years; and

(II) offering—

(aa) nationally significant cultural traditions practiced by the Eastern Band of Cherokee Indians;

(bb) authentic tradition bearers;

(cc) historic sites; and

(dd) historically important collections of Cherokee artifacts; and

(iv) the agricultural heritage established by the Cherokee Indians, including medicinal and ceremonial food crops, combined with the historic European patterns of raising livestock, culminating in the largest number of specialty crop farms in North Carolina.

(D) The artifacts and structures associated with those legacies are unusually well-preserved.

(E) The Blue Ridge Mountains are recognized as having one of the richest collections of historical resources in North America.

(F) The history and cultural heritage of the Blue Ridge Mountains are shared with the States of Virginia, Tennessee, and Georgia.

(G) there are significant cultural, economic, and educational benefits in celebrating and promoting this mutual heritage.

(H) according to the 2002 reports entitled “The Blue Ridge Heritage and Cultural Partnership” and “Western North Carolina National Heritage Area Feasibility Study and Plan”, the Blue Ridge Mountains contain numerous resources that are of outstanding importance to the history of the United States.

(I) it is in the interest of the United States to preserve and interpret the cultural and historical resources of the Blue Ridge Mountains for the education and benefit of present and future generations.

(2) PURPOSE.—The purpose of this section is to foster a close working relationship with, and to assist, all levels of government, the private sector, and local communities in the State in managing, preserving, protecting, and interpreting the cultural, historical, and natural resources of the Heritage Area while continuing to develop economic opportunities.

## (c) DEFINITIONS.—

## (1) In this section:

(A) HERITAGE AREA.—The term “Heritage Area” means the Blue Ridge National Heritage Area established by subsection (d).

(B) MANAGEMENT ENTITY.—The term “management entity” means the management entity for the Heritage Area designated by subsection (d)(3).

(C) MANAGEMENT PLAN.—The term “management plan” means the management plan for the Heritage Area approved under subsection (e).

(D) SECRETARY.—The term “Secretary” means the Secretary of the Interior.

(E) STATE.—The term “State” means the State of North Carolina.

## (d) BLUE RIDGE NATIONAL HERITAGE AREA.—

(1) ESTABLISHMENT.—There is established the Blue Ridge National Heritage Area in the State.

(2) BOUNDARIES.—The Heritage Area shall consist of the counties of Alleghany, Ashe, Avery, Buncombe, Burke, Caldwell, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, McDowell, Macon, Madison, Mitchell, Polk, Rutherford, Surry, Swain, Transylvania, Watauga, Wilkes, Yadkin, and Yancey in the State.

## (3) MANAGEMENT ENTITY.—

(A) IN GENERAL.—As a condition of the receipt of funds made available under subsection (i), the Blue Ridge National Heritage Area Partnership shall be the management entity for the Heritage Area.

## (B) BOARD OF DIRECTORS.—

(i) COMPOSITION.—The management entity shall be governed by a board of directors composed of nine members, of whom—

(I) two members shall be appointed by AdvantageWest;

(II) two members shall be appointed by Hand-Made In America, Inc.;

(III) one member shall be appointed by the Education Research Consortium of Western North Carolina;

(IV) one member shall be appointed by the Eastern Band of the Cherokee Indians; and

(V) three members shall be appointed by the Governor of North Carolina and shall—

(aa) reside in geographically diverse regions of the Heritage Area;

(bb) be a representative of State or local governments or the private sector; and

(cc) have knowledge of tourism, economic and community development, regional planning, historic preservation, cultural or natural resources development, regional planning, conservation, recreational services, education, or museum services.

## (e) MANAGEMENT PLAN.—

(1) IN GENERAL.—Not later than 3 years after the date of enactment of this section, the management entity shall

Deadline.

submit to the Secretary for approval a management plan for the Heritage Area.

(2) CONSIDERATION OF OTHER PLANS AND ACTIONS.—In developing the management plan, the management entity shall—

(A) for the purpose of presenting a unified preservation and interpretation plan, take into consideration Federal, State, and local plans; and

(B) provide for the participation of residents, public agencies, and private organizations in the Heritage Area.

(3) CONTENTS.—The management plan shall—

(A) present comprehensive recommendations and strategies for the conservation, funding, management, and development of the Heritage Area;

(B) identify existing and potential sources of Federal and non-Federal funding for the conservation, management, and development of the Heritage Area; and

(C) include—

(i) an inventory of the cultural, historical, natural, and recreational resources of the Heritage Area, including a list of property that—

(I) relates to the purposes of the Heritage Area; and

(II) should be conserved, restored, managed, developed, or maintained because of the significance of the property;

(ii) a program of strategies and actions for the implementation of the management plan that identifies the roles of agencies and organizations that are involved in the implementation of the management plan;

(iii) an interpretive and educational plan for the Heritage Area;

(iv) a recommendation of policies for resource management and protection that develop intergovernmental cooperative agreements to manage and protect the cultural, historical, natural, and recreational resources of the Heritage Area; and

(v) an analysis of ways in which Federal, State, and local programs may best be coordinated to promote the purposes of this section.

(4) EFFECT OF FAILURE TO SUBMIT.—If a management plan is not submitted to the Secretary by the date described in paragraph (1), the Secretary shall not provide any additional funding under this section until a management plan is submitted to the Secretary.

(5) APPROVAL OR DISAPPROVAL OF MANAGEMENT PLAN.—

(A) IN GENERAL.—Not later than 90 days after receiving the management plan submitted under paragraph (1), the Secretary shall approve or disapprove the management plan.

Deadline.

(B) CRITERIA.—In determining whether to approve the management plan, the Secretary shall consider whether the management plan—

(i) has strong local support from landowners, business interests, nonprofit organizations, and governments in the Heritage Area; and

(ii) has a high potential for effective partnership mechanisms.

(C) ACTION FOLLOWING DISAPPROVAL.—If the Secretary disapproves a management plan under subparagraph (A), the Secretary shall—

(i) advise the management entity in writing of the reasons for the disapproval;

(ii) make recommendations for revisions to the management plan; and

(iii) allow the management entity to submit to the Secretary revisions to the management plan.

(D) DEADLINE FOR APPROVAL OF REVISION.—Not later than 60 days after the date on which a revision is submitted under subparagraph (C)(iii), the Secretary shall approve or disapprove the proposed revision.

(6) AMENDMENT OF APPROVED MANAGEMENT PLAN.—

(A) IN GENERAL.—After approval by the Secretary of a management plan, the management entity shall periodically—

(i) review the management plan; and

(ii) submit to the Secretary, for review and approval, the recommendation of the management entity for any amendments to the management plan.

(B) USE OF FUNDS.—No funds made available under subsection (i) shall be used to implement any amendment proposed by the management entity under subparagraph (A) until the Secretary approves the amendment.

(f) AUTHORITIES AND DUTIES OF THE MANAGEMENT ENTITY.—

(1) AUTHORITIES.—For the purposes of developing and implementing the management plan, the management entity may use funds made available under subsection (i) to—

(A) make grants to, and enter into cooperative agreements with, the State (including a political subdivision), nonprofit organizations, or persons;

(B) hire and compensate staff; and

(C) enter into contracts for goods and services.

(2) DUTIES.—In addition to developing the management plan, the management entity shall—

(A) develop and implement the management plan while considering the interests of diverse units of government, businesses, private property owners, and nonprofit groups in the Heritage Area;

(B) conduct public meetings in the Heritage Area at least semiannually on the development and implementation of the management plan;

(C) give priority to the implementation of actions, goals, and strategies in the management plan, including providing assistance to units of government, nonprofit organizations, and persons in—

(i) carrying out the programs that protect resources in the Heritage Area;

(ii) encouraging economic viability in the Heritage Area in accordance with the goals of the management plan;

(iii) establishing and maintaining interpretive exhibits in the Heritage Area;

- (iv) developing recreational and educational opportunities in the Heritage Area; and
- (v) increasing public awareness of and appreciation for the cultural, historical, and natural resources of the Heritage Area; and
- (D) for any fiscal year for which Federal funds are received under subsection (i)—
  - (i) submit to the Secretary a report that describes, for the fiscal year—
    - (I) the accomplishments of the management entity;
    - (II) the expenses and income of the management entity; and
    - (III) each entity to which a grant was made;
  - (ii) make available for audit by Congress, the Secretary, and appropriate units of government, all records relating to the expenditure of funds and any matching funds; and
  - (iii) require, for all agreements authorizing expenditure of Federal funds by any entity, that the receiving entity make available for audit all records relating to the expenditure of funds.
- (3) PROHIBITION ON THE ACQUISITION OF REAL PROPERTY.—The management entity shall not use Federal funds received under subsection (i) to acquire real property or an interest in real property.
- (g) TECHNICAL AND FINANCIAL ASSISTANCE.—
  - (1) IN GENERAL.—The Secretary may provide to the management entity technical assistance and, subject to the availability of appropriations, financial assistance, for use in developing and implementing the management plan.
  - (2) PRIORITY FOR ASSISTANCE.—In providing assistance under subsection (a), the Secretary shall give priority to actions that facilitate—
    - (A) the preservation of the significant cultural, historical, natural, and recreational resources of the Heritage Area; and
    - (B) the provision of educational, interpretive, and recreational opportunities that are consistent with the resources of the Heritage Area.
- (h) LAND USE REGULATION.—
  - (1) IN GENERAL.—Nothing in this section—
    - (A) grants any power of zoning or land use to the management entity; or
    - (B) modifies, enlarges, or diminishes any authority of the Federal Government or any State or local government to regulate any use of land under any law (including regulations).
  - (2) PRIVATE PROPERTY.—Nothing in this section—
    - (A) abridges the rights of any person with respect to private property;
    - (B) affects the authority of the State or local government with respect to private property; or
    - (C) imposes any additional burden on any property owner.
- (i) AUTHORIZATION OF APPROPRIATIONS.—

(1) IN GENERAL.—There is authorized to be appropriated to carry out this section \$10,000,000, of which not more than \$1,000,000 shall be made available for any fiscal year.

(2) NON-FEDERAL SHARE.—The non-Federal share of the cost of any activities carried out using Federal funds made available under subsection (a) shall be not less than 50 percent.

(j) TERMINATION OF AUTHORITY.—The authority of the Secretary to provide assistance under this section terminates on the date that is 15 years after the date of enactment of this section.

SEC. 141. (a) PAYMENT TO THE HARRIET TUBMAN HOME, AUBURN, NEW YORK, AUTHORIZED.—(1) The Secretary of the Interior may, using amounts appropriated or otherwise made available by this title, make a payment to the Harriet Tubman Home in Auburn, New York, in the amount of \$11,750.

(2) The amount specified in paragraph (1) is the amount of widow's pension that Harriet Tubman should have received from January 1899 to March 1913 under various laws authorizing pension for the death of her husband, Nelson Davis, a deceased veteran of the Civil War, but did not receive, adjusted for inflation since March 1913.

(b) USE OF AMOUNTS.—The Harriet Tubman Home shall use amounts paid under subsection (a) for the purposes of—

(1) preserving and maintaining the Harriet Tubman Home; and

(2) honoring the memory of Harriet Tubman.

SEC. 142. Nonrenewable grazing permits authorized in the Jarbidge Field Office, Bureau of Land Management within the past seven years shall be renewed under section 402 of the Federal Land Policy and Management Act of 1976, as amended (43 U.S.C. 1752) and under section 3 of the Taylor Grazing Act of 1934, as amended (43 U.S.C. 315b). The terms and conditions contained in the most recently expired nonrenewable grazing permit shall continue in effect under the renewed permit. Upon completion of any required analysis or documentation, the permit may be canceled, suspended or modified, in whole or in part, to meet the requirements of applicable laws and regulations. Nothing in this section shall be deemed to extend the nonrenewable permits beyond the standard 1-year term.

SEC. 143. INTERIM COMPENSATION PAYMENTS. Section 2303(b) of Public Law 106-246 (114 Stat. 549) is amended by inserting before the period at the end the following: “, unless the amount of the interim compensation exceeds the amount of the final compensation”.

SEC. 144. Pursuant to section 10101f(d)(3) of the Omnibus Budget Reconciliation Act of 1993 (30 U.S.C. 28f(d)(3)), the following claims shall be given notice of defect and the opportunity to cure: AKFF054162–AKFF054163, AKFF054165–AKFF054166, and AKFF054170–AKFF054171.

SEC. 145. None of the funds appropriated or otherwise made available by this or any other Act, hereafter enacted, may be used to permit the use of the National Mall for a special event, unless the permit expressly prohibits the erection, placement, or use of structures and signs bearing commercial advertising. The Secretary may allow for recognition of sponsors of special events: *Provided*, That the size and form of the recognition shall be consistent with the special nature and sanctity of the Mall and any lettering or design identifying the sponsor shall be no larger than one-third

16 USC 1a-1  
note.



## Appendix 3 - Evaluation Methodology

### Background and Purpose

In May 2008, Congress passed legislation which requires the Secretary of the Interior to evaluate the accomplishments of nine National Heritage Areas (NHAs) no later than three years before the date on which authority for federal funding for each of the NHAs terminates. Based on the findings of each evaluation, the legislation requires the Secretary to prepare a report with recommendations for the National Park Service's future role with respect to the NHA under review.

The NHA evaluation process was designed to answer the following questions:

1. Based on its authorizing legislation and general management plan, has the Heritage Area achieved its proposed accomplishments?
2. What have been the impacts of investments made by Federal, State, Tribal and local government and private entities?
3. How do the Heritage Area's management structure, partnership relationships and current funding contribute to its sustainability?

ARCBridge's methodology for conducting the NHA evaluations includes: our core evaluation approach; evaluation design; associated data collection methods, sources, and measures; and analysis and reporting plans; and in-depth site interviews. The methodology builds upon the methodology and instruments used in previous NHA evaluations. In addition, the ARCBridge team has included case studies, profiles of key community partners, photos, and quotes to further illustrate the impact on the ground.

This document also describes the process ARCBridge has used to tailor the approach for each of the specific NHA evaluations.

### Core Evaluation Approach

Our approach to the NHA evaluation centers around three basic principles – stakeholder collaboration, in-depth and triangulated data collection, and efficiencies of time and effort. The evaluation will use a case study design, examining each NHA individually.

The case study design is appropriate for addressing the NHA evaluation questions since there are multiple variables of interest within each NHA and multiple sources of data with the need for convergence or triangulation among the sources. As noted below, data sources in each site will include documents, key informants from the coordinating/management entity and partner organizations, and community stakeholders. Data collection is guided by a case study protocol outlining the domains and measures of interest using topic-centered guides for extracting data from existing sources and for interviewing key informants (individually and in group interviews).

The evaluation incorporates a collaborative approach with project stakeholders to ensure that it is relevant to all and is grounded in the local knowledge of the site as well as designed to meet legislative requirements. Therefore, in the design and implementation of each evaluation, ARCBridge includes the perspectives of NPS and NHA leadership. Working products are developed in close coordination with NPS and the NHA evaluation sites throughout the evaluation process. Involving all key stakeholders and including varying perspectives at each stage of the process ensures that the data collection methods and indicators, the analysis, and interpretation of the findings reflect their views and concerns.

### Core Evaluation Design and Measures

ARCBridge has developed a core evaluation design to be tailored for each NHA evaluation. Three tools guide the development of the core evaluation design: the NHA Logic Model (Figure 1), the NHA Domain Matrix (Appendix C of the Guide), and a comprehensive case study protocol. The basic structure of the NHA Logic Model is a visual representation of the:

- Overarching goal for a NHA
- Resources and key partnerships available to help an NHA accomplish its goals
- Activities and strategies that are being implemented to accomplish the NHA goal
- Intended short-term and long-term outcomes
- The linkages among the activities, strategies, and outcomes

## NHA Logic Model

The logic model provides a blueprint for the case study design, outlining the components to examine, the indicators to measure, and the relationships to investigate between the various activities and outcomes. It is a key tool for outlining the data that should be collected as well as the types of analyses that might be conducted. In addition, it provides an efficient way to display the underlying logic or framework of the NHA. For the core evaluation design, the NHA logic model has guided the development of the NHA Domain Matrix, which in turn informs the development of a case study protocol to conduct the evaluation.

The NHA Domain Matrix is designed to thoroughly address the three key evaluation questions outlined in the legislation. The left-hand side of the matrix lists the key domains and measures required to answer each evaluation question. Each of these domains and measures are cross-walked with the potential data sources. Many of the domains will be informed by more than one data source, as is typical in a case study, to provide for more valid and complete results through triangulation of multiple perspectives. The sources for data collection include: existing NHA documentation, including foundational and financial documents; interviews with NHA staff and key partners; and input from citizens in the NHA community. A later section of this methodology will provide greater detail about the selected data sources and process for data collection. A brief synopsis of the Domain Matrix and how it guides our approach to addressing the key questions follows:

### Evaluation Question 1

**Based on its authorizing legislation and general management plan, has the heritage area achieved its proposed accomplishments?**

In addressing this question, ARCBridge will collect data through interviews and documents on the nature of the proposed NHA activities; how these activities are being implemented by the local coordinating entity/ management entity, partnership network and/or the local community; and, the impacts of the activities. The measures also will address whether the NHAs are implementing the activities proposed in the initial NHA designation, and if not, what circumstances or situations may have led to their adaptation or adjustment.

This examination consists of in-depth interviews with staff to understand what activities have resulted from the NHA designation that was initially not intended or expected. Also, in assessing the goals and objectives of the NHA, ARCBridge will try to discern if there were mechanisms in place prior to establishment of the NHA intended to achieve these goals.

### Evaluation Question 2

**What have been the impacts of investments made by Federal, State, Tribal and local government and private entities?**

Addressing this question will begin with gathering information through interviews with key NHA management staff and a review of financial data forms. Understanding what investments have been made will involve collecting data on both financial and non-financial investments, including data on the amount, nature, and sources of these investments over time. ARCBridge will also examine the impact of these investments and how they are helping the NHAs achieve their intended outcomes through data collected from reviewing NHA plans and interviews with key partners and local residents of the NHA community. In cases when an NHA has numerous investment sources, ARCBridge will focus on the NHA's "major" sources and whether these sources are restricted or unrestricted funds. To identify "major" sources of investment, the ARCBridge team will examine the range of investment sources and characterize them by financial or time commitment thresholds.

### Evaluation Question 3

**How do the heritage areas management structure, partnership relationships, and current funding contribute to its sustainability?**

Data to inform this question will be primarily gathered from interviews with key NHA management staff and a subset of NHA partners, and by performing a review and analysis of the NHA financial documents. The definition of sustainability developed by the NPS working group will be employed in addressing this question. We will examine the nature of management structure, partnership network, and their contribution to sustainability. We will also assess the financial investments over time and their corresponding impact on the financial sustainability of those investments and their future with and without future federal funding.

Specifically, the ARCBridge team will perform an analysis of the ratio of federal funding to other fund sources and the change in this ratio over time and for specific activities. ARCBridges will also interview NHA leadership, staff, and board members to understand the extent to which fundraising activities have been prioritized for specific activities.

Based on these analytic and data collection activities, an attempt would be made to determine what the likely effects on the NHA would be if federal funding was reduced or discontinued; specifically, which activities might have a prospect of continuing with reduced or discontinued federal funding, which would likely end with reduced or discontinued federal funding, and therefore, which goals and objectives might not be reached.

The evaluation will also examine if there are activities that support issues of national importance and should be considered for other federal funding. Finally, the evaluation will address how other organizations that exist within the Heritage Area might be effected by the sunset of federal funds, and if there are mechanisms in place for these organizations to work toward the Heritage Area goals post-sunset.

## Data Collection Methods

The planned data collection methods include: topic-centered interviews with NHA management staff; topic-centered interviews with members of the NHA partner network; intercept conversations with community stakeholders; review of the NHA plans and legal documents; review of the NHA guides, brochures, websites and other descriptive documents; and review of the NHA financial data records. In the sections below, ARCBridge describe each of these methods, including how we will select the data sources, what data we will collect, and the tools we will use to collect the data. For each of the methods, the ARCBridge team will begin by developing a “generic” instrument that corresponds to the key elements outlined in the domain matrix. The process for tailoring the instruments to each of the evaluation sites include:

### Foundation Documents Review

A first set of documents will be reviewed to frame the decisions and actions of the coordinating entity’s role in implementing the designated NHA’s objectives. These documents provide many of the objectives for the NHA and frame expectations for the local coordinating entity.

These documents include:

- Legislation – all Federal, State and/or local legislation that provides the legal framework for the NHA
- Plans – all planning documents, including updates, developed by the coordinating entity and/or partners that are intended to deliver the legal mandates defined by Congress and/or other legislative bodies
- Legal documents – documents signed by the coordinating entity that allow it conduct/produce routine NHA business

Another set of documents will be obtained and reviewed to understand the nature of NHA activities and their relationship with NHA objectives. These documents include: The National Heritage Area coordinating entity’s continuing ability to work collaboratively and reciprocally with Federal, State, community and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation, and economic development of nationally significant resources.

Critical components of sustainability of a National Heritage Area include but are not limited to:

- Coordinating entity and the National Park Service honoring the legislative mandate of the National Heritage Area
- Coordinating entity’s management capacity including governance, adaptive management (such as strategic planning), staffing, and operations
- Financial planning and preparedness, including the ongoing ability to leverage resources in support of the local network of partners
- Partnering with diverse community stakeholders including serving as a hub, catalyst and/or coordinating entity for on-going capacity building, communication and collaboration among local entities
- Program and project stewardship where the combined investment results in the improved economic value and ultimately long-term quality of life of that region
- Outreach and marketing to engage a full and diverse range of audiences
- Guides – documents designed to define how NHA business operates
- Annual financial statements and reports – includes audits, tax returns, budget activities, and performance program reports
- Annual reports – includes reports to Congress, to partners, and to the NPS and others

- Organizational structure and operations – how the coordinating entity, board(s) and committees do NHA work, their roles and functions
- Key milestones – a timeline of major events that document the evolution of the NHA to include outside influences affecting the planning and implementation process

The ARCBridge team will collaborate with each of the NHA coordinating entities and NPS to gather these materials. We will also provide sample table shells to help NHA coordinating entity staff understand evaluation data needs and identify relevant documents to share with our team.

In reviewing these documents, ARCBridge will abstract information into tables that historically document NHA activities, such as the number of visitors or number of workshops offered per year. We will also use a case study protocol to abstract key information and make use of data analysis software, such as NVivo, to meaningfully structure the data. This review of documents will be critical in helping ARCBridge tailor the specifics of the evaluation for each site, particularly in selecting NHA staff and partners to interview.

### **Financial Data Review**

ARCBridge will review key NHA financial data records such as audits, tax returns, budgets, and performance program reports to collect data on the amount and sources of funding for the NHA, trends in funding over a 10-year period, and the impact of these resources on the economic sustainability of the NHA.

ARCBridge will coordinate with each of the NHA coordinating entities and NPS to gather these materials and collect supporting documentation regarding external matching contributions and use of NHA resources according to program areas. We will use a protocol to guide the review of financial data needs with each NHA site.

### **Topic-Centered Interviews with Staff of the NHA Coordinating Entity**

During a follow-up site visit, key staff from the NHA coordinating entity will be interviewed. The staff will include the Executive Director and staff in key roles identified through a review of the foundational documents. For example, some of the staff selected for interviews could include managers of specific NHA activities (e.g., programming or marketing directors), or staff who work in

finance, development or partner relationship functions. A topic-centered, semi-structured protocol will be used to conduct each of the interviews, obtaining information about the background of the NHA, NHA activities and investments, and their associated impacts, including their contribution to NHA sustainability. ARCBridge will conduct individual interviews with the staff with the most history and scope of understanding of the NHA operations, such as the Executive Director or Finance Manager. Other staff, especially those with similar roles such as program assistants will be interviewed in groups to maximize the number of viewpoints gathered. Each of the topic-centered interviews will be semi-structured, outlining the key areas to cover and probes that are specific to the site. However, as new areas emerge, the interviews will be flexible to collect information on these areas. Although all interviews will be conducted on site at the coordinating entity, follow-up telephone conversations will be conducted as needed to capture additional information. We expect to spend one day interviewing up to nine staff in each NHA.

### **Topic-Centered Interviews with Members of the NHA Partner Network**

Members of the NHA partner network, including NPS, will be interviewed in order to gain an understanding about NHA activities and investments and their associated impacts, including their contribution to NHA sustainability. A topic-centered, semi-structured interview protocol will guide these discussions, some of which will be conducted individually, either in person or by telephone, and others that will be conducted through group interviews to maximize the number of viewpoints gathered. If applicable for the respective site, Arcbridge expects to select 15 to 20 partners from each NHA to interview. In determining criteria for selecting partners to interview, our team will review foundational documents and web site materials for each NHA site.

These criteria will likely include the level of the partner's relationship with the NHA, the extent to which they participate and/or support NHA activities, their financial relationship, and their geographic representation. Our team will share the list of selected partners with the NHA and incorporate the NHA's suggestions of other partners who should be interviewed. Once this list is finalized, ARCBridge will contact the partners for interview scheduling. We expect to have a range of stakeholders and organizations participate in these interviews, adding to the multiple sources of data for triangulation.

## Community Input

Members of the NHA community will be invited to provide their input about the nature and impact of NHA activities through intercept conversations with a sample of residents in the NHA community. These conversations may take place at the Heritage Area site or at an event or place within the community. Conversations will help the evaluation team gain an understanding of the community's familiarity with the Heritage Area and its unique and nationally significant aspects. The intercept conversations will also provide information about the residents' awareness of and appreciation for the Heritage Area. ARCBridge will work with the NHA management entity to develop strategies for obtaining community input.

It is important to recognize the limitations in the data that will be collected through the community input strategies. First, as the evaluation team will be identifying "convenient" groups of individuals, it is likely that those involved will not be fully representative of local residents, tourists, and volunteers. Depending on how they are identified, they have more or less motivation to be interested in the NHA. In addition, the data collected will be largely qualitative. We will not be able to develop quantitative indicators of the community input, but rather collect more impressionistic input that will provide an indication based on each respondent's background, prior involvement, and interest as to how well the NHA is enhancing community awareness of, appreciation of, and involvement in the NHA.

## Analyze Data and Findings Document

The analysis and synthesis of each NHA's data will be guided by the overall protocol and the Findings Document outline. Data reduction will first begin by summarizing the data within each domain area, first within each source, and then synthesizing the data across sources. Attempts will be made to reconcile any issues or discrepancies across the sources by contacting the relevant parties at each NHA. Data will be summarized within each domain and analyzed for relationships, guided by the logic model. To the degree possible, results will be displayed graphically and in tables. Findings will reflect the triangulated information – where appropriate and feasible, it will be important to ensure that the results not only reflect the perspectives of the key informants but are substantiated with data from documents and other written sources.

Results of each NHA evaluation will be communicated in a findings document. The findings document will be guided by a modification of the outline finalized by the NHA Evaluation Working Group. The findings document outline has been streamlined to present key findings in an Executive Summary, combine sections according to the three evaluation questions, and address sustainability questions regarding the impact of the sunset of federal funds on NHA activities.

ARCBridge will first share a draft of the findings document with the Executive Director of the NHA coordinating entity for a review of technical accuracy. The Executive Director will have the opportunity to share the findings document with other staff and stakeholders as desired, and can provide comments to the evaluation team, either in writing or via telephone discussion. Finally, if necessary to discuss differences, a joint telephone conversation involving the NHA Executive Director, NPS and ARCBridge can be held to discuss the comments and to arrive at a resolution. Once ARCBridge has incorporated the feedback, the NHA coordinating entity will have another opportunity to review the findings document before it is shared with NPS. Once the NHA's final feedback is reviewed and incorporated, ARCBridge will submit the draft findings documents to NPS for review.

## Tailoring the Evaluation Design for NHA Evaluation Sites

The core evaluation design will be tailored to individual NHAs under evaluation. A preliminary "Meet and Greet" visit to the NHAs will largely inform how the protocols should be customized for each site, including the domains that are relevant, the probes that should be added to inquire about each domain, and the specific data sources that are relevant for the site. ARCBridge will work with the Executive Director to determine the key staff to involve in individual and group interviews during a second site visit, partner organizations that should be represented, and strategies to obtain community input.

A customized logic model for each NHA will be developed during the initial site visit; detailing the respective NHA's goals, resources, partnerships, activities and intended outcomes. This process will involve a group meeting with NHA management staff and NPS partners to get a diverse range of perspectives and obtain a complete picture of the designated NHA.

In preparation for this visit, ARCBridge will review existing documentation for the NHA sites. The evaluation team expects these preliminary Meet and Greet visits and logic modeling sessions to involve about two days of travel and meeting time.

Once the tailored logic models are finalized for each NHA evaluation site, ARCBridge will then adapt the NHA Domain Matrix and the comprehensive case study protocol that were developed as part of the core evaluation design. These tailored tools will still address the evaluation research questions identified by the legislation, but will ensure that the questions are geared toward the specific aspects of each NHA site.

Interview data collection for each NHA evaluation will occur during a second visit to each NHA site, and is expected to last 3 to 5 days depending on the scope of the site. ARCBridge will use memos to keep the NHA Executive Director informed of our evaluation activities both pre- and post- site visits.

ARCBridge will also work with each NHA during the second site visit, and with email and phone communications post site-visit, to collect and analyze information for the financial review. The financial data protocol will provide the NHA coordinating entity with an understanding of the data needed to address the second evaluation question. It will also help identifying the years in which there is audit information pertinent to the evaluation, and will help NHA coordinating entity staff to identify other data sources that support financial analysis.

## Evaluation Limitations

To the greatest extent possible, ARCBridge has tried to ensure this evaluation methodology thoroughly addresses the three research questions. However, there are parameters to this methodology that result in a few limitations on evaluation findings. In some instances, there is a trade-off between maximizing the time and efficiency for the evaluation and the ability to thoroughly collect information from a range of stakeholders. For instance, to obtain input from community stakeholders, a survey is not possible within the current evaluation due to OMB Paperwork Reduction Requirements. Therefore, the data received from intercept conversations will be a more qualitative assessment of the community's perceptions of the NHA.

As noted, limitations to the community input include convenient, rather than representative, samples of tourists, local residents, and volunteers, and impressionistic rather than quantitative data on the impact of the NHA on stakeholder knowledge, attitudes, and involvement in the NHA. Therefore, the data obtained will have to be viewed with these limitations in mind.

## Appendix 4 - Domain Matrices

Research Question, Domains, Measures							
Evaluation Q.1: Has the BRNHA achieved the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?	NHA Management Interviews	Partner Interviews/ staff at program sites	Reps of the Community and on-site visits	Strategy plans, Marketing plans, Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
<b><i>Nature and scope of BRNHA activities</i></b>							
Description of preservation, interpretation and education activities	x	x	x	x	x		
Do BRNHA Programs cover the full range of anticipated programs?	x	x	x	x	x	x	x
Is there strong involvement from all anticipated parts of the community?	x	x		x	x	x	x
<b><i>Assess Impact of activities</i></b>							
Development that is successful in meeting objectives	x	x	X	x	x		
Increased awareness							x
Heightened visibility of BRNHA resources and stories		x	X	x			x
Economic Impact / Job creation		x			x		

Table A4.1: Evaluation Question 1

Research Question, Domains, Measures							
Evaluation Q.2 What have been the impacts of investments made by Federal, State, Tribal, and local government and private entities?	NHA Management Interviews	Partner Network Interviews/ staff at program sites	Reps for the Community and on-site visits	Strategy plans, Marketing plans), Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
Consistency of donor support	x	x				x	x
Expansion of base of donors over time	x			x		x	x
Economic Impact / Job creation	x				x	x	
<b>Describe Other types of investment</b>							
Partnership contributions (e.g., time, staff, resources)	x	x		x		x	x
Community contributions (e.g., volunteerism)	x	x	x	x			x
Other In-Kind donations	x	x				x	
Assess Impact of other investment sources							
Educational impacts	x	x		x			
Marketing and promotional	x	x		x		x	
Staff enhancement and retention	x	x		x		x	
Land/facilities acquisition	x	x		x		x	
Economic Impact / Job creation	x					x	

Table A4.2: Evaluation Question 2



Research Question, Domains, Measures							
Evaluation Q.3 How do the NHA management structure, partnership relationships and current funding contribute to its sustainability?	NHA Management Interviews	Partner Network Interviews/ staff at program sites	Reps for the Community and on-site visits	Strategy plans, Marketing plans, Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
Growth and development of partner networks	x	x		x			x
Transparent and effective communication channels with governance, staff, volunteers, partners, etc.	x	x	x	x	x		
Established and consistent communication mechanisms with partners, members and local resident	x	x	x	x	x		x
BRNHA has leadership role in partnering	x	x					x
Describe Nature of partner network	x	x	.	x			x
List of partners						x	x
Purpose of each partnership		x	X			x	
Partners' involvement with BRNHA	x	x					x
Resource commitment from partners	x						x
Assess Partner network's to sustainability	x						x
Broad base of partners representing diverse interests and expertise in the BRNHA	x						x
Partner collaboration and combination of investments to accomplish BRNHA objectives	x					x	x

Table A4.3: Evaluation Question 3

## Appendix 5 - Community Intercept Survey

### Questions for Visitors

Hello!

I am working on an evaluation project for the Blue Ridge National Heritage Area, part of the National Park Service. We are speaking with a few visitors in the Blue Ridge area to develop an understanding of what consumers know about the Blue Ridge National Heritage Area. Do you have a couple of minutes to talk with me? Thank you.

1. Are you from the local area or are you from somewhere else? Where are you from?
2. How did you find out about this program? Advertising, hotel, on the local news or the newspaper? Word of mouth? The Internet? BRNHA signage?
3. Did you learn about this program when you arrived in town or before that?
4. Is this your first visit or have you been here before?
5. What have you learned from this site?
  - Historical info
  - Cultural or artistic information
  - About nature
6. Had you previously known about the Blue Ridge National Heritage Area? If so, what did you know?
7. Have you visited other NHAs?
8. Did you look at:
  - Brochures,
  - Signage
  - The National Heritage website
  - Themes of the NHA
  - Role of the NHA in the community? What did you learn from these materials?
9. How likely are you to tell others that you know about this location? What would you tell them?
10. Would you encourage people you know to come here? Why?