NATIONAL HERITAGE AREA MANAGEMENT PLANNING

Recommendations for the Mountains to Sound Greenway

Prepared for the Mountains to Sound Greenway Trust

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EXECUTIVE SUMMARY

The Mountains to Sound Greenway Trust (Greenway Trust) is a non-profit organization which aims to conserve and enhance the landscape surrounding the portion of Interstate 90 that spans from Central Washington to the Puget Sound. This landscape, known as the Mountains to Sound Greenway (Greenway landscape), is host to multiple nationally significant historical narratives and sites. The Greenway Trust is seeking Congressional designation of the Greenway landscape as a National Heritage Area (NHA), a designation that recognizes landscapes where natural, cultural, and historic resources collectively tell a story of national importance. Furthermore, NHA designation provides a non-regulatory framework for coordination across jurisdictions to aid cooperation in the conservation, management, and interpretation of resources. The primary venue for developing and implementing this cooperative management is through the NHA management plan. The NHA management plan contains the themes, inventory of resources, and 15-year strategic plan for the NHA and must be completed within three years of designation. In anticipation of receiving NHA designation, our team of consultants has developed recommendations for the Greenway Trust to consider in preparation for the NHA management planning process.

To prepare these recommendations, our team looked to the experience of existing NHAs. Our analysis includes a screening of all 49 existing NHA management plans, a detailed review of a subset of 11 NHA management plans that share similarities with the Greenway landscape, and stakeholder interviews with representatives from these 11 NHAs, the National Park Service (NPS), and several consultants that have supported previous NHA management planning processes.

Considering the Greenway Trust's position and needs, we organize our findings and recommendations into five categories, related to the questions of how to engage the public, partners, and Native nations, and how to adopt the role of a coordinating entity.

1. **Overarching** – Several noteworthy concepts and considerations transcend categorization because they arise repeatedly and consistently throughout many phases of management planning. To promote smooth management planning across the three-year process, we recommend the following actions:

   a. *Conduct a stakeholder analysis* to characterize the network of individuals, communities, and organizations that care about what happens to the Greenway landscape.

   b. *Conduct a program analysis* to identify what specific services the Greenway Trust is currently providing and what other types of programming will need to be added to meet the organizational responsibilities of NHA designation.

   c. *Expand external capacity for support* by seeking out potential NHA management planning consultants and building relationships with the Alliance of NHAs and the NPS.

   d. *Adjust management planning to fit organizational needs* by examining the Greenway landscape closely to determine which elements of suggested NPS activities do and do not fit with the particular characteristics of the landscape.

   e. *Simplify the NHA vision* by distilling a few simple themes that anchor NHA activities, providing clarity on the Greenway Trust's mission and goals for seeking NHA designation throughout the many phases of management planning.

2. **Coordinating entity** – If the Greenway landscape receives NHA designation, the Greenway Trust intends to serve as the coordinating entity. The role of the coordinating entity is unique, as it requires a local organization to oversee a federally-designated area of land, and to provide management and facilitation to a broad range of activities and partnerships contained within the Area. To serve as an effective coordinating entity, our recommendations are summarized into the following actions:

   a. *Build relationships* immediately with the many organizations that may support the NHA management planning process and contribute to future, more formalized partnerships.

   b. *Identify the niche role* that the Greenway Trust intends to fill within the NHA, supporting rather than duplicating efforts of other initiatives in the region.

   c. *Refer to previous NHA management plans* (and our provided plan template) and *hire a consultant* to bolster the planning process.

   d. *Prepare for how the NHA designation will change* the Greenway Trust's management and implementation activities; staff and Board of Directors; and funding and administrative responsibilities.

3. **Civic engagement** – A major component of the management planning effort is to conduct a thorough civic engagement process. This civic engagement process is intended to collect stories within the NHA that represent the historic and cultural significance of the area. Additionally, an effective civic engagement process informs all residents and entities within the area of the NHA designation and management planning process; consults these groups on how to best develop the management plan; and involves them in the drafting of the plan. Our recommendations are arranged into the following actions:

   a. *Expand the stakeholder analysis* to identify the communities and entities within the NHA that should be involved in the civic engagement process.

   b. *Perform a power-mapping* exercise to highlight formal and informal leaders who can sway opinion and promote effective coordination.

   c. *Strive for full participation* throughout the civic engagement process by aiming to inform, consult, and involve as many individuals and entities as necessary.

   d. *Invest time in building relationships* with strategically selected individuals, communities, and organizations.

   e. *Reach communities* that may not already be involved with the Greenway Trust.

   f. *Build capacity* for continued engagement, so that the included groups can continue to contribute to NHA management beyond the planning process.

4. **Partnerships** – Partnerships are foundational to NHA coordination and instrumental to the success of every phase of planning and implementation. As coordinating entities are unable to provide all NHA-related services on their own, partnerships allow coordinating entities to

facilitate more projects and programs throughout the Area. Our recommendations are narrowed to the following actions:

a. *Build and leverage trust* with entities that may provide valuable partnerships after the planning process. This trust-building will be an extension of the relationship-building and stakeholder analysis recommendations mentioned, respectively, in the coordinating entity and civic engagement sections.

b. *Partner with historical societies and tourism boards*, as these two groups will prove invaluable to a successful NHA but are currently not as well-connected with the Greenway Trust.

c. *Invest in coordination capacity* so that the Greenway Trust is well-suited to not only build but also maintain effective partnerships.

d. *Strategically formalize partnerships* by identifying the appropriate terms of engagement with different partners. While some partnerships may require formal agreements and ongoing programming, other partnerships may be informal or based on single projects.

e. *Include diverse partnerships* so that the relationships built through the civic engagement process are institutionalized, long-lasting, and incorporated into the management of the NHA.

5. **Native nations** – The Greenway landscape encompasses territory addressed in the Treaty of Point Elliott and the Yakama Treaty, which reserve hunting, fishing, and other rights within the proposed NHA for the Yakama, Tulalip, Lummi, Nooksack, Stillaguamish, Swinomish, Upper Skagit, Suquamish, Sauk-Suiattle, and Muckleshoot Nations. Partnerships with these sovereign nations require considerations beyond those recommended above. To ensure that these Native nations are not only considered but are actively involved in a leadership capacity in the NHA, we recommend the following actions:

a. *Understand Tribal sovereignty*, learning the unique perspectives and priorities of the Native nations listed above.

b. *Build trust* with Native nations, starting immediately and continuing through the planning and management of the NHA.

c. *Share power* with Native nations by providing leadership opportunities within the management of the NHA and in partnerships throughout the NHA.

d. *Center Indigenous heritage* by allowing Native nations to lead the interpretation of their own histories and heritage.

e. *Incorporate Indigenous perspectives* into cooperative land management planning. The coordinating entity should empower, not compromise, the federal trust responsibility in maintaining Tribal treaty rights to public lands.

CHAPTER 1: INTRODUCTION

1.1. BACKGROUND

The Mountains to Sound Greenway (Greenway landscape) encompasses Interstate 90 from central Washington to the shores of Puget Sound. The landscape contains the state's largest metropolitan area and is host to multiple nationally significant historical narratives and sites. The Coast Salish nations, inhabitants of this landscape since time immemorial, established footpaths across Snoqualmie Pass to create a trading route with nations in the Columbia Plateau, ultimately connecting to trading networks in the Great Plains. Native nations eventually ceded millions of acres to European American colonists, but reserved the right hunt, fish, and gather on their ancestral homelands. Following the Civil War, the construction of the North Pacific and Milwaukee Railroads through the Cascade Mountains region provided a firm link between the eastern United States and the newly settled Pacific Northwest. A historic transportation corridor, the Greenway landscape facilitated immigration to the Northwest, trade with Asia, and a deep culture of outdoor recreation inspired by the rugged beauty of the Cascade Mountains. The Indigenous heritage and recent immigrant history of the corridor continue to define the Greenway landscape today. The terrain was shaped by the largest land grant in history, when a patchwork of every other square mile radiating forty miles from the railroad track was given as a subsidy to the North Pacific Railway in the late 1800s. This massive transfer into private ownership fueled the rise of industrial timber and the eventual movement to reclaim the mountains through public land conservation. The Greenway landscape's bountiful natural resources have inspired demand and awe for centuries, leading to dramatic shifts in land use and ownership, and defining the livelihoods of the region's inhabitants. See Map 1 for a depiction of conserve and public lands within the Greenway landscape.

Map 1. The Mountains to Sound Greenway, from Central Washington to Puget Sound

Source: Mountains to Sound Greenway Trust
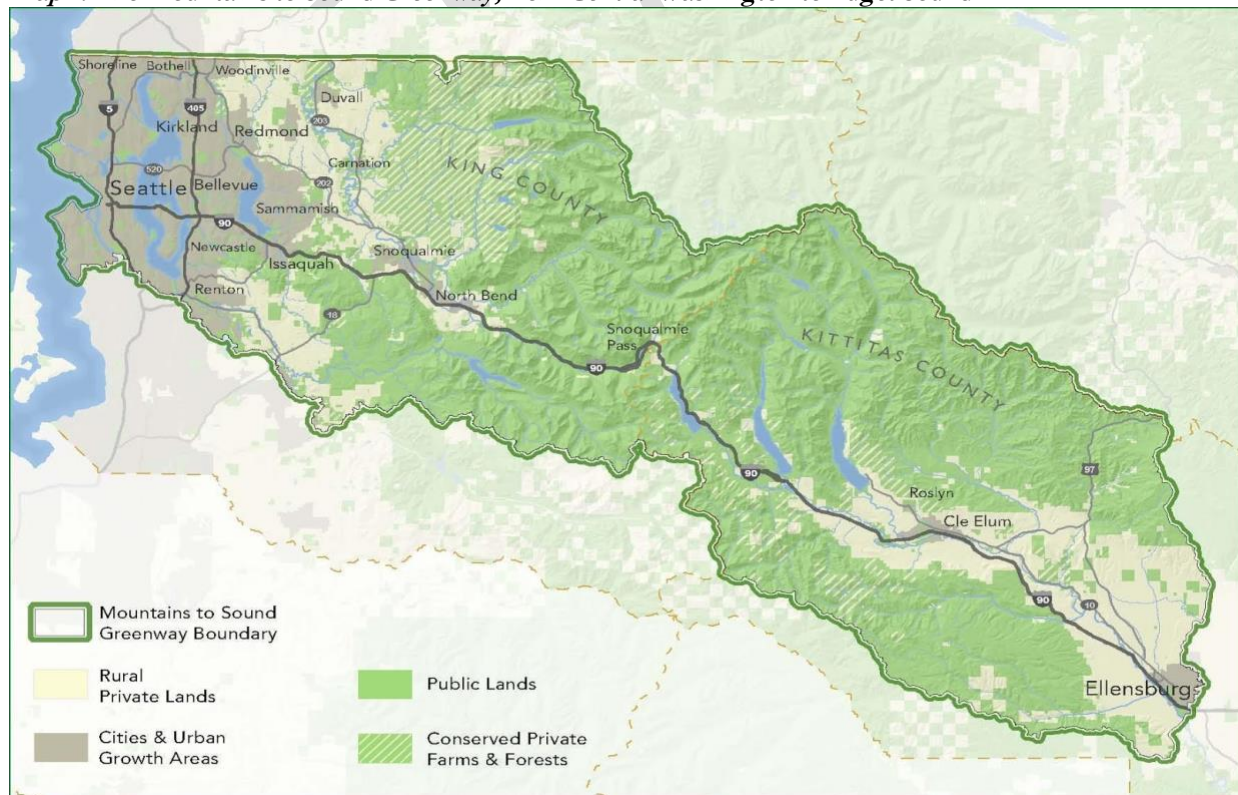
With the goal of protecting the remaining intact forests of the region, the Mountains to Sound Greenway Trust (Greenway Trust) was founded by a group of community leaders in 1990, representing environmentalists; developers; small businesses; and local, state, and federal officials. Collaborative from the beginning, the Greenway Trust provides a forum for businesses, public agencies, nonprofits, and the general public to identify opportunities to conserve and enhance the Greenway landscape.

Beginning in 2010, the Greenway Trust initiated a bipartisan campaign to designate the landscape as a National Heritage Area (NHA) in an effort to preserve and celebrate the rich history of the Greenway landscape and address a number of land management challenges. The National Park Service (NPS) describes an NHA as a place where "natural, cultural, and historic resources combine to form a cohesive, nationally important landscape." NHAs generally comprise a variety of public and private land designations, blending lived-in environments with parks and nationally significant historical sites.

Historic land grants created a patchwork of intermingled state, federal, and local land ownership throughout the Greenway landscape. This variable public land management across a continuous landscape requires extensive coordination to maintain habitat and recreation sites. Federal NHA designation provides a non-regulatory approach to facilitate this cross-jurisdictional collaboration. Without affecting private property, water, hunting, fishing, or Tribal treaty rights, NHA designation provides a setting for federal, state, and local entities to collectively conserve and enhance a region's natural and cultural resources. Enhanced inter-agency collaboration in the Greenway landscape holds significant benefit for fundraising, habitat restoration, and trail development and maintenance.

As one of the only cross-jurisdictional federal designations, NHA recognition will enable the stewardship and oversight required for the Greenway landscape to thrive under increasing recreational demand. In 2014, the NPS approved a feasibility study for the Greenway NHA, which illustrated the nationally important cultural and natural resources retained in the landscape. Designation of the Greenway landscape currently awaits congressional action, as an attachment to the Energy and Natural Resources Act of 2017 in the United States Senate. Once designated, the Greenway Trust is required to submit an NHA management plan to the United States Department of the Interior within three years. While awaiting NHA designation, the Greenway Trust is developing strategies for conducting the management planning process.

1.2. RESEARCH QUESTION

How should the Greenway Trust conduct the National Heritage Area management planning process given the lessons learned from experiences of existing NHAs?

1.3. PROJECT DESCRIPTION

As specified in the authorizing legislation, an NHA management plan includes the goals, strategies, and actions that will be enacted over the first 10-15 years of the NHA, as well as a resource inventory and an interpretive plan for communicating local heritage. To identify these goals, strategies, and actions, the NHA management planning process must include active public engagement from a range of stakeholders across the Area. The entire management planning process, including public engagement, is expected to take three years to complete following NHA designation. To bolster the Greenway Trust's preparedness, our consulting team presents this document to provide

recommendations for conducting the management planning process and developing a management plan. We highlight findings from previous NHAs and present recommendations regarding the role of the coordinating entity, the civic engagement process, partnership development, and Tribal involvement. These findings and recommendations are developed from a review of management plans for the existing 49 NHAs; an analysis of a subset of 11 NHA management plans similar to the Greenway landscape; and interviews with NHA representatives, the NPS, and consultants. Given the uncertainty of congressional designation, this document does not prescribe specific components of the management plan, but instead provides an outline to assist management planning as well as recommendations for the Greenway Trust to reference when preparing for and beginning the planning process. The full outline is referred to in *Appendix A*. While some components included in the outline are standard, every NHA has unique management needs, and therefore the outline is not intended to replace strategic management planning or function as a drag-and-drop template.

The rest of the report is organized as follows:

- In *Chapter 2: Research Methods and Strategies,* we provide an overview of our research process including review of 49 NHA management plans and analysis of a subset of 11 plans, stakeholder interviews, and additional literature.

- In *Chapter 3: Findings*, we present the results of our analysis of the subset of 11 management plans and stakeholder interviews.

- In *Chapter 4: Recommendations*, we provide important lessons learned that may be useful for creating a management plan for the Greenway NHA.

- In *Chapter 5: Conclusion*, we provide a brief conclusion of the purpose and outcome of the report.

- In *Appendix A: NHA Management Plan Outline*, we provide an outline for the Greenway Trust to help support the creation of a management plan if the Greenway landscape is granted NHA status.

- In *Appendix B: Screening Criteria*, we outline the criteria by which we screened all 49 NHA Management Plans.

- In *Appendix C: Summary of Coding Spreadsheet*, we provide the information collected from each of the subset of 11 management plans and further analyzed to inform our findings and recommendations.

- In *Appendix D: Profile of Eleven NHA Coordinating Entities*, we provide a table profiling the subset of 11 NHA management plans that we reviewed and analyzed in depth.

- In *Appendix E: Interview Agenda,* we provide a summary of our interview agenda and a list of interview questions.

- In *Appendix F: Summary of Civic Engagement in Management Plans*, we provide a sampling of approaches to involving the public in planning.

- In *Appendix G: Summary of Bright Spot Partner Entities*, we provide a summary of different types of partnerships and the benefits they have provided to existing NHAs.

CHAPTER 2: RESEARCH METHODS AND STRATEGIES

2.1. OVERVIEW

In this chapter, we describe our research methods and strategies to provide transparency and context for our findings and recommendations. We explain our applied techniques in hopes of providing guidance to continued research after designation. As an overarching strategy for studying NHA management planning, we focus our research on existing NHAs through the review of documents and individual conversations. Our research methods, chosen with input from Greenway Trust staff and Evans School faculty, consist of three approaches—management plan review and analysis, stakeholder interviews, and literature review—summarized in Table 1 below, along with the goals of each method.

Table 1. Types of Research Analysis with Corresponding Goals

ANALYSIS TYPE	DESCRIPTION	GOAL
Management Plan Review & Analysis	A review of the 49 NHA management plans, which led to an in-depth analysis of 11 NHA management plans that shared the most similar characteristics to the Greenway.	To identify: • A subset of management plans to further investigate • Bright spots from successful management plans most relevant to the Greenway
Stakeholder Interviews	Phone interviews with employees or founders of the coordinating entities of the subset of 11 NHA management plans; NPS employees; and consultants who have worked on NHA feasibility studies, management plans, and evaluations.	To determine: • Best practices for conducting NHA planning • Common challenges to development and implementation of an NHA management plan
Literature Review	Additional literature review to support recommendations.	To understand: • Accepted and rejected practices for collaboration with Native nations

Prior to beginning our research, in partnership with Greenway Trust staff we identified several guiding questions that the Greenway Trust anticipates when developing their NHA management plan. We consider these following questions as priority challenges for the Greenway Trust:

- What organizational changes should the Greenway Trust anticipate before and after NHA designation?

- How can the Greenway Trust conduct a civic engagement process that represents a diversity of perspectives?

- How should the Greenway Trust best incorporate Tribal governments into the planning process?

- How can the Greenway Trust best incorporate and balance the many themes within the Greenway landscape (e.g., transportation, outdoor recreation, conservation) into one comprehensive management plan?

- How can the Greenway Trust build effective partnerships with different agencies and organizations throughout the Greenway landscape?

These principal challenges underlie our management plan review and analysis as well as our stakeholder interviews. Our methodology therefore aims to determine best practices for addressing the Greenway Trust's priority challenges and chronicles additional management planning knowledge when useful.

2.2. MANAGEMENT PLAN REVIEW

The objective of our NHA management plan review is to identify recommendations for developing and implementing the NHA management planning process required by NPS designation. Because of the unique attributes of NHAs and relatively standardized NPS requirements, we focused our review on existing NHA management plans. Our management plan review included two sequential steps, described in Table 2 below.

Table 2. Management Plan Review Process

STEP	PROCESS	DESCRIPTION	GOAL
1	Initial Management Plan Review	Initial screening of 49 NHA management plans across high-level criteria that serve as metrics for comparison to the Greenway landscape	Identify subset of management plans to further investigate
2	Subset Analysis	Thorough analysis of subset of 11 NHA management plans, including numerous criteria specific to Greenway landscape considerations and general to NHA management planning	Identify bright spots from successful management plans most relevant to the Greenway landscape

We began our management plan research by reviewing all 49 existing NHA management plans. Using a short list of screening criteria (see *Appendix B*), our goal was to identify similarities between existing NHAs and the Greenway landscape. We screened the 49 NHA plans for characteristics related to transportation, tribal involvement, natural resource conservation, and outdoor recreation, as these are central aspects of the Greenway landscape. We also recorded inclusion of major metropolitan areas and National Forests. "Interpretive themes" served as another useful comparison attribute, as each NHA management plan is required to distill the NHA goals and activities into a short list of these interpretive themes. NHAs must establish at least three interpretive themes, linking the histories of culture, natural, and built landscapes in the designated region through cohesive narratives. Finally, given the Greenway Trust's identified challenge of organizational change upon designation, we screened for NHAs with coordinating entities that existed in some form prior to designation.

Following the review of all NHA management plans, we discussed the unique qualities and similarities of each document, identifying bright spots and drawbacks based on our screening criteria. Through a qualitative process, as well as consultation with Greenway Trust staff, we selected 11 comparison management plans which aligned with important characteristics of the Greenway landscape. The subset of plans reflects a diversity of NHAs in regard to geography, key features and themes, and date of designation, while holding relevance to the needs of the Greenway Trust. The selection of NHAs is illustrated in Map 2 and detailed in Table 3.

Map 2. Map of all existing NHAs, with subset of 11 selected for analysis highlighted in purple.
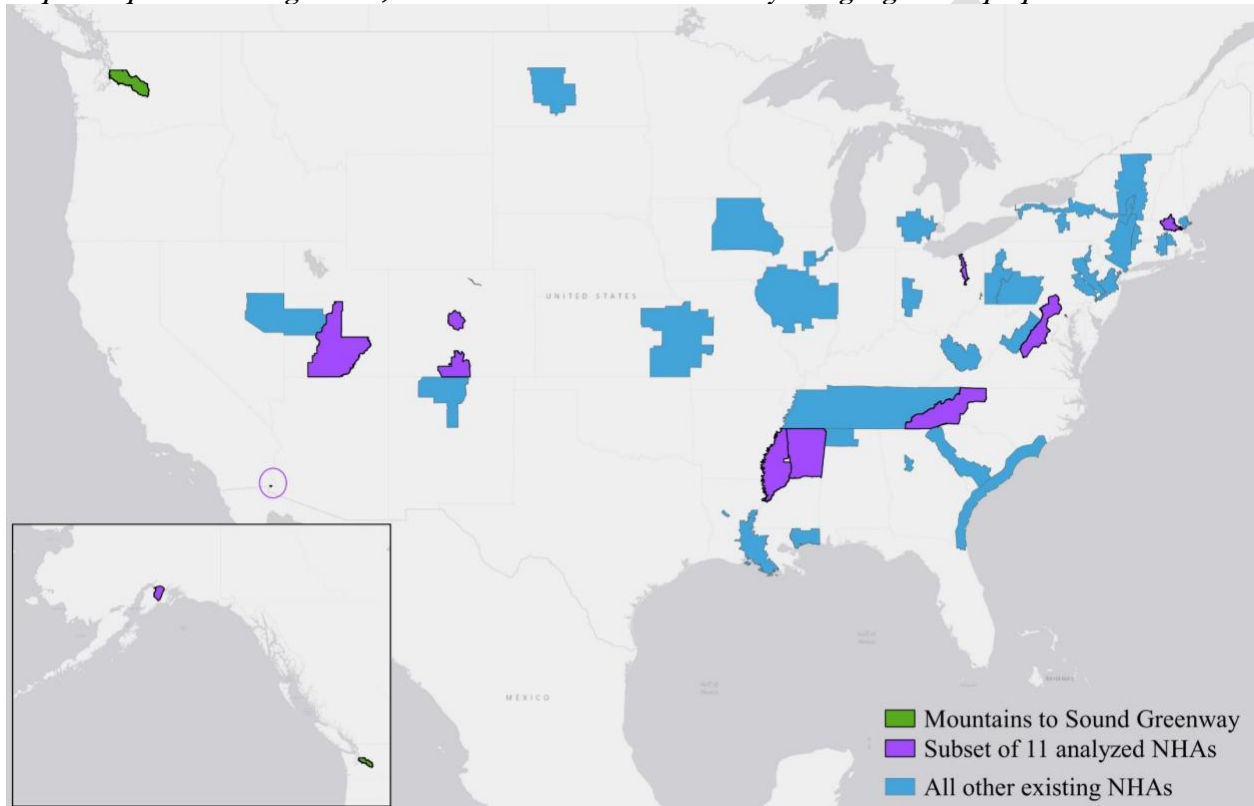
Data Source: NPS and the Mountains to Sound Greenway Trust

Table 3. Subset of 11 NHAs and Key Characteristics

BASIC INFORMATION				THEMES			NHA CHARACTERISTICS	
National Heritage Area	State	Year NHA Est.	Years Entity Was Established Before NHA	Transportation	Environment / Natural Resources	Native American History	Size of NHA, as ratio to Greenway*	Includes National Forest?
Blue Ridge	NC	2003	0	N	Y	Y	4.3 : 1	Y
Freedom's Way	MA	2009	15	N	Y	Y	0.4 : 1	N
Journey Through Hallowed Ground	PA - WV	2008	3	N	Y	Y	2.2 : 1	N
Kenai Mountains - Turnagain Arm	AK	2009	9	Y	Y	Y	0.8 : 1	Y
Mississippi Delta	MS	2009	0	Y	Y	N	4.5 : 1	Y
Mississippi Hills	MS	2004	0	Y	Y	Y	5.2 : 1	Y
Mormon Pioneer	UT	2004	4	Y	Y	Y	6.6 : 1	Y
Ohio & Erie Canal Way	OH	1996	0	Y	Y	N	0.25 : 1	N
Sangre de Cristo	CO	2009	0	Y	Y	Y	1.5 : 1	Y
South Park	CO	2009	0	Y	Y	Y	0.6 : 1	Y
Yuma Crossing	AZ	2000	8	N	Y	Y	0.004 : 1	N

2.3. MANAGEMENT PLAN ANALYSIS

To analyze the subset of 11 NHA management plans, we developed a list of specific attributes to collect for each plan specifically pertaining to the unique context and challenges facing the Greenway Trust. The collection of these particular attributes allows for a systematic comparison of character traits of each NHA, which facilitated our analysis of these NHA management plans. These attributes guided detailed information collection across a range of topics relevant to the Greenway Trust, including:

- interpretive themes related to outdoor recreation, transportation, and natural resources;

- Native nations collaboration, cultural influence, and history;

- inter-agency and cross-jurisdictional collaborations;

- characteristics of and organizational changes experienced by coordinating entities; and

- strategies for incorporating rural and metropolitan areas into the planning process.

These attributes informed the development of a coding spreadsheet, which we used to collect detailed information for each of the 11 NHA management plans. See *Appendix C* for an outline of the categories of information collected through the coding spreadsheet. After reviewing each of the 11 management plans and filling in the coding spreadsheet with applicable information, we then analyzed the results to identify unique characteristics and shared trends across the management plans. See *Appendix D* for additional details for the subset of 11 NHA management plans. The results from this coding process provide the foundation for our stakeholder interviews and our final recommendations. Figure 1 provides a visualization of the flow of our management plan review and analysis processes.

Figure 1. Flow of Literature Review Methodology

STEP 1

Goal: *Identify subset of existing NHA management plans that may contain most relevant information to Greenway landscape*

Process:

a) Review all 49 National Heritage Area management plans.

b) Screen for characteristics similar to Mountains to Sound Greenway area (e.g., themes around transportation, natural resources, Native American history; existing coordinating entity; includes National Forest).

Themes: 26 mention transportation, 29 mention natural resources, and 19 mention Native American history

21 have a coordinated entity that existed prior to the NHA designation

14 include National Forest land within the NHA boundary

c) Screen for management plans that are generally exemplary, easy to read, and provide outstanding examples for the Mountains to Sound Greenway to reference.

d) Of the 49 management plans, identify a subset of plans most relevant to the Mountains to Sounds Greenway or with most useful templates and content.

Subset of 11 management plans identified for further review

STEP 2

Goal: *Comprehensively review all 11 management plans, identify bright spots, and summarize key findings across 11 documents.*

Process:

a) Read through 11 management plans and code for information in the following areas: coordinating entity, civic engagement, themes, inventory, business plan, relationships and partnerships, tribal involvement, funding, and other.

Subset of 11 management plans identified for further review

b) Summarize findings across subset of 11 management plans.
c) Identify gaps of information to address during stakeholder interviews.

2.4. STAKEHOLDER INTERVIEWS

We conducted stakeholder interviews with 16 individuals representing 14 organizations. We began our interviews with staff from coordinating entities for the subset of 11 heritage areas targeted for analysis. We then conducted additional interviews with contacts suggested through interviews with staff. We developed our interview protocol and questions based on gaps in information identified in management plan analysis as well as input from Greenway Trust staff. See *Appendix E* for interview agenda and questions.

2.5. ADDITIONAL LITERATURE

The management plans and interviews provide a wealth of information regarding most aspects of NHA management planning, however after analyzing these plans we identified several gaps in information that left us unable to address the Greenway Trusts' priority challenges. Specifically, we felt a need to elucidate the theory of engaging the general public and working with Native Nations. For these topics, we sought additional research and recommendations from academic and professional literature to complement our findings.

2.6. NATIONAL PARK SERVICE EVALUATIONS

Congress requires that all NHAs to conduct and share evaluations of their respective Area, comparing progress made with the original management plan, within fifteen years of designation. Of the existing 49 NHAs, the NPS has conducted formal evaluations for a third of the NHAs. These studies evaluate the following outcomes:

- The achievements of the NHA compared to planned projects

- The impacts of public and private investments

- The sustainability of the NHA's governance and funding models

Following the management plan research process, we conducted case study analyses of the following four NHA evaluations: Yuma Crossing, Ohio & Erie Canal Way, Silos & Smokestacks, and Hudson River Valley. Two of these evaluations correspond with NHA management plans from the analyzed subset of 11 and two plans are outside of our subset of 11 plans. Searching for relevant bright spots and challenges, we found the evaluations to be less useful than expected in offering critical examinations of NHA successes and challenges. The evaluations generally reveal what projects the NHAs have accomplished, but they do not thoroughly discuss how and with what mechanisms, resources, and approaches the organizations utilized to achieve success. The lack of analytical description in the evaluations reduced our ability to generalize any findings to the Greenway landscape's context. Therefore, we conclude that the NPS evaluations are not a valuable resource for this specific review and we do not present any findings or recommendations related to them.

CHAPTER 3: FINDINGS

These findings capture overarching trends and bright spots we observed through interviews and analysis of the subset of 11 NHA management plans. Given the amount of information collected, we do not attempt to present a full compilation or summary, but rather highlight the most valuable takeaways for the reader. We categorize the findings into the following sections that we identify as particularly relevant to the Greenway Trust and landscape:

1. Coordinating entity
2. Civic engagement
3. Partnerships
4. Tribal involvement

3.1. COORDINATING ENTITY

3.1.1. INTRODUCTION

While the NHA program as a whole is overseen by the NPS, the management of each individual NHA falls under the responsibility of the organization designated in the NHA legislation. This organization, referred to as the coordinating entity, serves as the "facilitator, host, and guide for the heritage area-wide presentation and has responsibility for aspects of its implementation. In the broadest sense, the entity serves as the curator for the NHA experience – helping to shape all aspects of that experience, through encouraging partners' involvement, stimulating research, assembling unique elements, and offering its own perspective (Freedom's Way NHA Management Plan, pp. 79)."

Because the coordinating entity plays such a critical role in the management of the NHA, and because serving as a coordinating entity is a unique experience when compared to other public land management arrangements, we identify key themes and considerations that face NHA coordinating entities. Specifically, through our analysis we identify five key themes related to the experiences of coordinating entities. These five themes include:

1. Pre-Existing and Newly Designated Entities
2. Cooperative Management and Dual Designation
3. Board of Directors Engagement
4. Organizational Capacity
5. Niche Role of Coordinating Entity

See the following sections for additional details and findings within each of these five themes. Additionally, see *Appendix D* for a table with additional details on the coordinating entities corresponding with each of the 11 NHAs we analyzed, including the year established, sector, approximate staff size, and annual budget.

3.1.2. PRE-EXISTING AND NEWLY DESIGNATED ENTITIES

Congressionally designated, identifying the organization to serve as the coordinating entity can take a variety of approaches. In some instances, the organization designated as the coordinating entity existed previously as a non-profit organization, tourism association, university, or municipal government. For

example, the Delta Center for Culture and Learning (Delta Center) located within the Delta State University existed prior to the designation of the Mississippi Delta NHA. During the feasibility study process, the Delta Center was identified as an existing organization that shared many of the intended values of the Mississippi Delta NHA and was proposed as the coordinating entity in the NHA legislation. In other instances, the coordinating entity is established as a new entity—usually as a non-profit organization or non-profit BOD—at the same time as the NHA is designated. For example, when legislation designated the Blue Ridge NHA in 2003, this legislation also named a nine-member BOD as the coordinating entity. This nine-member Board then applied for and received 501(c)3 status as a non-profit operating as the Blue Ridge NHA Partnership.

Through our initial screening of the 49 existing NHAs, we identify 21 NHAs with coordinating entities that existed prior to NHA designation and 26 NHAs with coordinating entities that were established at the same time as the NHA.[1] Of the 11 NHAs that we reviewed in further detail, five have coordinating entities that existed prior to NHA designation and six were established at the time of NHA designation. See Table 4 for a list of the 11 NHAs with the year their corresponding coordinating entities were established.

Table 4. Coordinating Entities Established Before and After NHA Designation

NHA		COORDINATING ENTITY		
Name	Year Est.	Name	Year Est.	Sector
Coordinating Entity Established Prior to NHA Designation				
Journey Through Hallowed Ground NHA	2008	The Journey through Hallowed Ground Partnership	2005	Non-profit
Freedom's Way NHA	2009	Freedom's Way Heritage Association	1994	Non-profit
South Park NHA	2009	Tourism and Community Development Office, Park County	-	Government
Mississippi Delta NHA	2009	Delta Center for Culture and Learning	2000	University
Kenai Mountains – Turnagain Arm NHA	2009	KMTA Corridor Communities Association	2000	Non-profit
Coordinating Entity Established at Time of NHA Designation				
Ohio & Erie National Heritage Canal Way	1996	Ohio & Erie Canal Association	1996	Non-profit
Yuma Crossing NHA	2000	Yuma Crossing NHA Corporation	2000	Non-profit
Blue Ridge NHA	2003	Blue Ridge NHA Partnership	2003	Non-profit
Mormon Pioneer NHA	2004	Utah Heritage Highway 89 Alliance	2006	Non-profit

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[1] For two NHAs (Path of Progress National Heritage Tour Route and South Carolina National Heritage Corridor), we were unable to identify whether the coordinating entity existed prior to NHA designation or not.

Mississippi Hills NHA	2004	Mississippi Hills Heritage Area Alliance	2004	Non-profit
Sangre de Cristo NHA	2009	Sangre de Cristo NHA	2009	Non-profit

While we identify six NHAs that established new coordinating entities at the time of NHA designation, we also find that some of these new coordinating entities were built from existing organizations and efforts. For example, though the Ohio & Erie National Heritage Canal Way (Ohio & Erie Canal Way) created a new coordinating entity at the time of NHA designation, the coordinating entity serves as a bridge between two pre-existing non-profits: Canal Way Partners (formerly known as Ohio Canal Corridor) which was founded in 1985, and the Ohio & Erie Canal Way Coalition which was founded in 1989. Additionally, while the Blue Ridge NHA Partnership was created at the same time as the Blue Ridge NHA, the idea to seek designation was born from the efforts of two pre-existing organizations: Handmade in America, which aimed to build a heritage trail in Western North Carolina, and Advantage West, a regional economic development organization.

Of the NHAs that have pre-existing coordinating entities or have newly established entities that work closely with pre-existing entities, several report a significant advantage when conducting the management planning process. South Park NHA notes in their management plan that "the South Park National Heritage Area has the advantage of having extensive partnerships developed from its beginnings in 1997 as a county and state initiative (pp. 29)." Both the Ohio & Erie Canal Way and the Blue Ridge NHA note that the staff and infrastructure of the pre-existing organizations were critical to developing the management plan and that these organizations allowed the NHAs to draw on existing partnerships and projects to support the planning process.

3.1.3. COOPERATIVE MANAGEMENT AND DUAL DESIGNATION

While all NHAs have a coordinating entity, each coordinating entity employs different management strategies tailored to the NHA's unique needs. Examples of unique management strategies include seeking dual designations, joint management, and regional networking. Regarding dual designations, four NHAs (Mormon Pioneer, Sangre de Cristo, Journey Through Hallowed Ground, and the Ohio & Erie Canal Way) incorporate and oversee a scenic byway within their heritage area; the Freedom's Way NHA includes a scenic byway within its area, however the byway designation is overseen by a different entity. The four organizations that oversee both designations report that each offers complementary services: the byway encourages thruway travel and the NHA encourages opportunities for engagement throughout travel.

Other NHAs utilize cooperative management strategies, where the coordinating entity designated through Congress may share responsibility with a separate organization. For example, the Ohio & Erie Canal Way Association serves as the coordinating entity for the Ohio & Erie Canal Way, but this entity has no staff capacity and instead is solely comprised of a Board of Directors. In lieu of staff capacity within the coordinating entity, NHA staffing and project implementation is carried out by two separate non-profit organizations (Canal Way Partners and Ohio & Erie Canal Way Coalition). Yuma Crossing NHA is coordinated by the Yuma Crossing NHA Corporation but shares staff and other resources with the City of Yuma.

Finally, some coordinating entities establish regional or county heritage councils that provide additional support to the planning and management of the NHA. Blue Ridge NHA has 26 Local

Heritage Councils (one for each of the 25 counties located within the NHA, as well as an additional council within the Qualla Boundary). These heritage councils allow Blue Ridge NHA to delegate and decentralize management planning and project implementation across the broad geographic area and ensure that the NHA planning represents the different needs and interests of each of the counties and Qualla Nation that fall within the heritage area.

3.1.4. BOARD OF DIRECTORS ENGAGEMENT

While staff of the coordinating entity or partner organizations may carry out many of the projects within the NHA, an engaged BOD can provide vision and leadership to NHA planning and oversight. Several NHAs emphasize the importance of BOD involvement and participation throughout the NHA management planning process. Both Freedom's Way and the Mississippi Delta NHAs note that throughout the planning process, they made targeted efforts to engage and inform their respective BODs. The Freedom's Way Heritage Association has made efforts to provide more responsibility to individual BOD members, as the added responsibility allows members to engage with and feel more accountable to NHA planning and project implementation. The Director of the Delta Center, of the Mississippi Delta NHA, met individually with each BOD member to inform members of their role in NHA oversight and to gain feedback for NHA management.

Coordinating entities also intentionally incorporate more diverse perspectives on the BOD. The Freedom's Way Heritage Association BOD was originally primarily comprised of members representing historical societies. After receiving NHA designation, the Association worked towards diversifying BOD representation to also include members from cultural heritage tourism, education, and museums. Freedom's Way NHA notes that this representation is better suited to the needs of the NHA, while representation from historical societies was more suited to the needs of the Association prior to designation. Additionally, Sangre de Cristo NHA includes elected officials on the BOD and Blue Ridge NHA requires that at least one BOD seat be from Cherokee Nation.

3.1.5. ORGANIZATIONAL CAPACITY

Our sample of NHA coordinating entities represents a range of staff and budget capacity. See Table 5, as well as *Appendix D*, for an overview of the varying organizational capacity. Several NHAs note that the management planning process and ongoing NHA management is more resource-intensive than originally expected. A range of new activities, from civic engagement to standardized financial reporting and performance evaluation can strain existing capacity. Freedom's Way Heritage Association had zero staff members at the start of the management planning process and reported that this planning process required significantly more time than the volunteer BOD could manage. They therefore required two additional years to complete the management plan, and completing the plan was largely successful due to the hiring of a staff member in the final year of the planning process. Mississippi Hills NHA found that they did not have the staff capacity required to conduct the management planning process at the start and needed to hire additional staff. Many NHAs (Freedom's Way, Journey Through Hallowed Ground, Mississippi Delta, Ohio and Erie, and Yuma Crossing) report that despite increased work, NHA designation has attracted additional funding. However, Blue Ridge NHA found that partner organizations expected the NHA designation to bring in large amounts of additional funding, and that while funding did increase, expectations needed to be tempered when this large funding increase did not occur. Several NHAs also report that the unreliability of congressional appropriations constrains federal funding to capital investments, meaning staff and operational costs must be funded from other sources.

Table 5. Coordinating Entity Staff Size and Budget

NHA NAME	COORDINATING ENTITY NAME	STAFF SIZE	ANNUAL BUDGET
Blue Ridge NHA	Blue Ridge NHA Partnership	5	$800,000
Freedom's Way NHA	Freedom's Way Heritage Association	1	$840,000
Journey Through Hallowed Ground NHA	The Journey through Hallowed Ground Partnership	9-13	-
Kenai Mountains – Turnagain Arm NHA	KMTA Corridor Communities Association	6	$245,000
Mississippi Delta NHA	Delta Center for Culture and Learning	3	-
Mississippi Hills NHA	Mississippi Hills Heritage Area Alliance	4-8	-
Mormon Pioneer NHA	Utah Heritage Highway 89 Alliance	-	-
Ohio & Erie National Heritage Canal Way	Ohio & Erie Canal Association	0	$438,000
Sangre de Cristo NHA	Sangre de Cristo NHA	4	$369,000
South Park NHA	Tourism and Community Development Office, Park County	2	$600,000
Yuma Crossing NHA	Yuma Crossing NHA Corporation	11	$2.2 million

In addition to the time-intensive planning process, several NHAs report that it is important to either establish or maintain projects in the area as well. Ohio & Erie Canal Way found that maintaining existing projects provided additional motivation to staff and community members for the long-term planning and increased aspirations for what projects should be proposed within NHA management plan. Blue Ridge NHA Partnership reported that more than half of their time and resources went to project implementation, and they were able to allocate only about a quarter of their time to the planning process.

Regardless of each coordinating entity's organizational capacity during the management planning process, we find that consultants were used by nearly all of the 11 NHAs we analyzed. Consultants can be used for a variety of purposes, from managing the entire three-year planning process to providing support on specific components of the planning process. For example, both Yuma Crossing and South Park NHAs hired consultants to manage the whole process, while Ohio & Erie Canal Way hired a consultant for only the data collection and drafting of the management plan. The Ohio & Erie consultant reviewed reports and strategic plans from organizations throughout the NHA, while the Ohio & Erie Canal Way felt it appropriate, as the coordinating entity, to oversee the civic engagement process to build relationships with community members. South Park NHA reported hiring a consultant to manage the entire planning process was actually not as successful as originally intended, as the consultant did not have the same knowledge or connection with the community as the coordinating entity. However, Mississippi Hills NHA stated that while consultants are expensive, it is

worth the investment; due to the uniqueness of NHAs in general, they found it extremely valuable to work with consultants that had prior experience drafting a management plan.

3.1.6. NICHE ROLE OF COORDINATING ENTITY

Many NHAs stress the important role that the coordinating entity must provide to partner organizations within the heritage area. Journey Through Hallowed Ground NHA, for example, said that the NHA designation improved community perception of the coordinating entity. Additionally, the Journey Through Hallowed Ground Partnership felt a new sense of authority over the region. Yuma Crossing NHA found that the NHA role filled a gap that previously existed in the community. Yuma Crossing chose to pursue NHA designation because the community had struggled for 20 years to revitalize the Colorado River waterfront in the Town of Yuma; NHA designation severed to unify the many community groups interested in this project.

We find that coordinating entities feel successful if they can unify and amplify existing efforts of partners within the NHA region, rather than duplicating efforts that have been or are currently underway. For example, the Delta Center for Culture and Learning has addressed the concern of "over-studying" their region by creating programs like the Delta Jewels Oral History Partnership, which provides a forum to share the valuable stories collected from the region over the years. Freedom's Way NHA stated that within the NHA, there are many entities that existed prior to NHA designation which provide services that are relevant and vital to the NHA's character. Freedom's Way Heritage Association found that rather than attempt to duplicate the efforts of existing entities, the role of the coordinating entity should be to facilitate collaboration across entities and enhance the interconnectedness of these existing efforts and services.

3.2. CIVIC ENGAGEMENT

3.2.1. INTRODUCTION

One of the NHA coordinating entity's most resource-intensive jobs while developing a management plan is pursuing consistent civic engagement. The NPS requires the public to be aware of and ideally involved in the planning activities that follow congressional designation: "Because national heritage areas are a vehicle for locally initiated protection and interpretation of natural, cultural, scenic and historic resources much of the important work is the organizing that goes on at the beginning of the process to build consensus and momentum in the region." In order to best represent the diversity of stakeholder perspectives within an NHA, coordinating entities are encouraged to conduct thorough outreach via their civic engagement processes.

This section focuses on three categories that attempt to capture the complexity of the civic engagement process:

1. The civic engagement spectrum
2. Community social capital
3. Diverse perspectives in civic engagement

NHAs may involve stakeholders using a range of tactics and to varying degrees. We find it useful to conceptualize NHA civic engagement through an adaption of the International Association for Public Participation Spectrum which helps define roles of the public in a public participation process. An NHA conducting thorough civic engagement informs constituents about the NHA through awareness
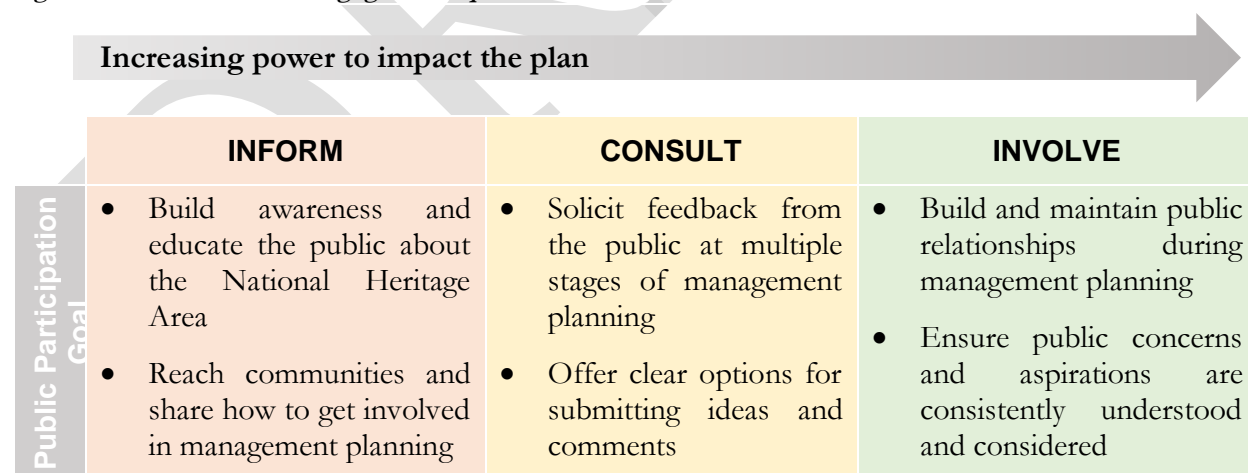
and education, consults constituents on the NHA by soliciting feedback, and involves constituents in the NHA by building relationships. NHAs that employ the full participation spectrum report greater confidence in their public relations than NHAs that conduct partial engagement. NHAs that operate in only part of the spectrum report that public relations, and especially awareness, remains a challenge after the management planning process is complete. Given the logistical and strategic challenge of thorough public outreach, consultant assistance is common, and was used by Mississippi Hills, Blue Ridge, South Park, and Yuma Crossing NHAs.

Civic engagement usually involves interfacing with a range of stakeholder types. NHAs that communicate with both the public and specific stakeholder groups, like community-based non-profits or local interest groups, tend to collect more robust feedback. Finally, participatory methods that focus on diverse perspectives enrich the historical and cultural narratives of an NHA management plan. NHAs that listen to marginalized communities and concerned citizen groups and incorporate their perspectives build trust and unearth stories unique to local heritage. Of note, the following civic engagement findings do result from a fully comprehensive dataset; they depend on the relative detail of management plans and information from stakeholder interviews, which vary naturally in both quality and depth.

3.2.2. THE CIVIC ENGAGEMENT SPECTRUM

Our management plan analysis and interviews show that civic engagement manifests across phases of outreach that create a spectrum of public participation, represented in Figure 2. Thorough engagement often includes repeated interactions with members of the public within and across phases. Although the civic engagement process is not necessarily linear, most coordinating entities begin by building awareness and answering questions and later return for feedback from a more informed constituency. NHAs that take engagement a step further focus on building and maintaining relationships with stakeholders throughout management planning. It is common for NHAs to build initial awareness about NHA designation and less common for NHAs to advance to relationship building.

Figure 2. The NHA Civic Engagement Spectrum

Increasing power to impact the plan

	INFORM	CONSULT	INVOLVE
Public Participation Goal	• Build awareness and educate the public about the National Heritage Area • Reach communities and share how to get involved in management planning	• Solicit feedback from the public at multiple stages of management planning • Offer clear options for submitting ideas and comments	• Build and maintain public relationships during management planning • Ensure public concerns and aspirations are consistently understood and considered

Source: Adapted from IAP2 International Federation Public Participation Spectrum

Full Participation: Inform, Consult, & Involve

NHAs that operate across the civic engagement spectrum report strong constituent support and higher satisfaction as well as creative heritage interpretation informed by local community stories.

After Blue Ridge received designation, the coordinating entity engaged the public in forming working heritage councils for each county and the Qualla Boundary. Heritage councils comprised volunteer representatives of civic, government, nonprofit, and private organizations who recognized the value to their communities of heritage resources. Resource officers from the North Carolina Department of Commerce led each council. This platform enabled well-dispersed awareness and management of the NHA and linked communities through relationship-building.

Ohio & Erie Canal Way included extensive engagement in 75 public meetings targeted to the general public, local elected officials, government agencies, citizen groups, and other non-profits. Grassroots planning committees, located in communities along the trail, supported public engagement around the Towpath Trail System, located along the length of the trails. The Trail System contributed to economic development of the region, encouraging greater involvement from local companies and residents. Journey Through Hallowed Ground also reports thorough and iterative civic engagement activities. The NHA conducted hundreds of public meetings throughout the territory and conducted 60 stakeholder interviews with potential partners. The coordinating entity also hired a market research firm to survey the interests of visitors to the region.

A caveat to iterative engagement is the fear of over studying the area—raised by Mississippi Delta, Yuma Crossing, Mississippi Hills, and Blue Ridge—which fatigues engagement partners. Mississippi Hills reports that clearly differentiating phases of the process, between project scoping, public meetings, and comment periods, can keep stakeholders engaged. Ohio & Erie Canal Way emphasizes the need to be relevant to specific communities while maintaining wide appeal to multiple stakeholder types.

Partial Participation: Inform & Consult

NHAs that focus on parts of the civic engagement spectrum report some constituent involvement during initial outreach, but these NHAs appear to lack strong public buy-in throughout the management planning process.

Mississippi Delta NHA conducted public meetings during feasibility planning which sparked excitement and expectation for NHA designation. During management planning, however, civic engagement halted. Once informed community members realized they lacked up-to-date information on the management plan, individuals expressed a feeling of disconnect with and exclusion from the NHA planning process and therefore the NHA itself. Public meetings commenced after plan submission, but in the communication vacuum during planning, the NHA lost valuable public traction.

Mormon Pioneer NHA distributed a kickoff edition of their publication that coincided with a public celebration to create awareness about congressional designation. The coordinating entity leveraged local officials and newspapers to market public scoping sessions in each county intending to make the planning process transparent. Throughout management planning, local newspaper coverage in small towns incentivized attendance at public meetings for soliciting feedback on the plan.

Limited Participation: Inform

NHAs that conduct relatively light public engagement often focus exclusively on initial awareness building and, as a result, they report generally weak program presence and spotty public awareness in their regions, even after completing management planning.

For example, South Park conducted a multi-day circuit of site visits with local interest groups at the onset of planning. Additionally, they convened open houses in each of six primary communities and mailed meeting notices to every post office box within the NHA boundary. Beyond this, civic engagement was quite limited. In a similar approach, Kenai Mountains – Turnagain Arm NHA (Kenai Mountains) made single visits to existing public meetings and reported sentiments of general skepticism. Their plan cites regular press releases to local newspapers and radio channels regarding management planning and attempted contact with thirty stakeholders for interviews. Yuma Crossing admittedly conducted no new outreach for management planning and relied on outreach completed by the City of Yuma during previous strategic planning. While the City of Yuma provided support for meetings required by NPS management planning standards, the NHA reports their lack of concerted civic engagement was a challenge.

In another instance, Freedom's Way NHA's civic engagement predominantly focused on stakeholders already aware of the NHA program. Three public workshops solicited input on the plan and an online survey of potential partners identified organizational interests and priorities. An additional workshop was held with regional historians, educators and interpreters. The coordinating entity reports that time and staffing constrained deeper civic engagement. Post-management planning, the coordinating entity, the Freedom's Way Heritage Association, reports that more involved stakeholder engagement uncovered that the heritage area is the birthplace of Transcendentalism and the American conservation movement.

Figure 3. Subset of 11 NHA Management Plans Using Civic Engagement Tactics
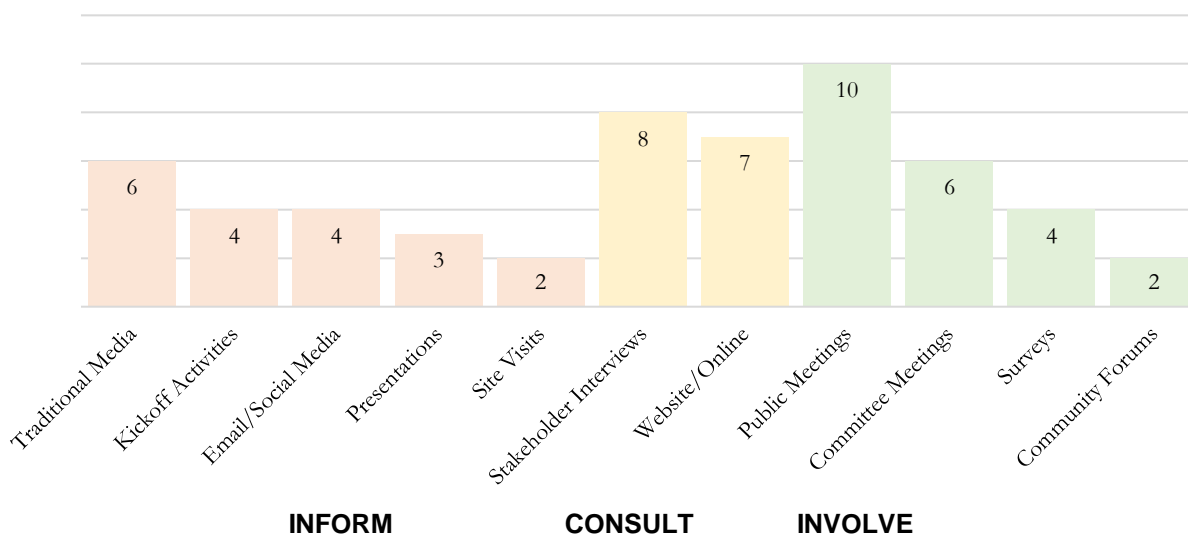
While each NHA enacts an engagement approach best suited to its region, many outreach techniques are universally applicable. The processes tabulated in Figure 3 are gathered from the analyzed subset of 11 management plans. Public meetings and stakeholder interviews are most commonly cited in management plans while community forums and site visits are utilized rarely. Six of 11 plans engage

in traditional media outreach and develop committees to drive certain aspects of management planning. Four of 11 plans describe kickoff activities, utilizing surveys to collect specific information, and email or social media campaigns. A comprehensive summary of engagement tactics, strategies, and relevant examples can be found in *Appendix G.*

3.2.3. COMMUNITY SOCIAL CAPITAL

While all NHAs engage the public in some form, those that go beyond general engagement and find genuine local connections tend to report more fruitful and creative feedback and less opposition. NHAs that employ some form of community ambassadors, whether representatives from specific groups or simply familiar individuals are often able to collaborate more effectively across political and industry lines. Generally, NHAs report better success harnessing public energy through mechanisms like committees, councils, and task forces than through public meetings, likely due to the fact that these tactics are more conducive to the development of social capital. Strong relationships also allow individual skill sets to surface and contribute to the process.

In South Park, one major accomplishment of the NHA was due to one individual's community relationships. A planner who helped initiate the South Park NHA was a lifelong resident and an avid fisherman with familiarity in the ranching community. Relying on established, trusted relationships, he was able to develop a county program to lease fishing rights along trout streams on private ranches, charging anglers $50-90 per day. Revenue is split between ranchers and the county, which uses proceeds for restoration projects. The co-benefits of the program, South Park Trout, won over ranchers, instilling their trust in the county and even local government.

In the case of Mormon Pioneer, a champion of the NHA hailed from the local community. A small business owner, this individual led the preservation of the historic downtown of Mount Pleasant through the National Mainstreet Program, a skill set and lauded accomplishment that benefited the NHA. In Yuma Crossing, a leading staff member built community connections slowly over time, fostering relationships with the Quechan Indian Nation and farmers. These partnerships proved essential to the major accomplishments down the road. Other investments in community engagement in Yuma resulted in successful crowdfunding for two threatened state parks.

3.2.4. DIVERSE PERSPECTIVES IN CIVIC ENGAGEMENT

NHAs that focus on local story gathering reveal unique heritage and can narrow NHA interpretive scope. Freedom's Way reports that since management planning, more focused and feasible interpretation has been inspired by discovering local narratives through interaction with residents as well as conducting national landmark studies. In any region, certain stories are more commonly known than others; surfacing lesser known narratives can be a way for an NHA to draw interest and add value beyond existing historical interpretation. A consultant interview cited the Chesapeake NHA for prioritizing African American heritage in the region, especially the life of Harriet Tubman, whose powerful story had been overlooked by local historical societies.

NHAs that prioritize iterative face-to-face engagement in spaces familiar to stakeholders build excitement and trust in their projects. Consultant interviews highlight the power of visiting communities prior to public meetings and incorporating a variety of engagement approaches to maximize exposure to new ideas. NHAs that make an effort to visit community groups in places comfortable for the community report greater ability to bring in new voices and build understanding. South Park found that going into communities facilitated better engagement than requiring constituents to travel to perhaps unfamiliar locations. Mississippi Delta described the need for safe

spaces for marginalized communities; acknowledging that segregation history is still present in the region helped create a platform for sharing information and growing trust. In Mississippi Hills, personalized contact with representatives whom actually reflected the community enabled relationship-building. For pre-existing contacts, follow-up meetings in intimate face-to-face spaces facilitated information sharing in a private setting before public forums.

In at least five cases in Ohio & Erie Canal Way, Kenai Mountains, Yuma Crossing, Mormon Pioneer, and Blue Ridge NHAs, coordinating entities encountered public fear of federal overreach. A way some NHAs address these concerns and incorporate diverse interests is by anticipating skepticism and finding and prioritizing projects important to specific groups. Yuma Crossing reported that collaborating with the Quechan Indian Nation and farmers on projects with co-benefits was a successful approach for creating shared ownership of NHA interpretation. Ohio & Erie Canal Way NHA reported a fraught relationship with private property owners who believed designation was a threat to their land. It took the NHA seven years to negotiate and finalize a single easement. To prevent this scenario, the coordinating entity suggests being abundantly clear about what an NHA can and cannot do as well as representing the voices of landowners in the work of the NHA. Overall, the NHAs that are collaborative rather than paternalistic describe a rewarding experience working with underrepresented communities.

Table 6. Suggested Technologies for Civic Engagement

SUGGESTED TECHNOLOGIES FOR CIVIC ENGAGEMENT
mySidewalk – A web-based city intelligence tool that helps analysts in local government get data out of silos and into operational, strategic, and policy decision-making processes.
The Clio App – An app that guide users to monuments, historic sites, walking tours, and more using GPS, images, maps, audio, video, and other resources. Available in most U.S. cities.
SurveyMonkey – A surveying tool that provides free, customizable surveys, as well as a suite of paid back-end programs including data analysis, sample selection, bias elimination, and data representation tools.
PartnerTool.net – A social network analysis tool designed to measure and monitor collaboration among people or organizations. Designed for use by collaboratives or coalitions to demonstrate how members are connected, how resources are leveraged and exchanged, levels of trust, and outcomes.
Talking Points – An interactive map platform developed by the US Forest Service to collect spatial information from the public. Similar mapping platforms include Maptionnaire and Community Remarks.

Especially in conversations with consultants who have contributed to management planning, and in some discussions with coordinating entities, we were provided suggested technologies for augmenting civic engagement, summarized in Table 6. From a web-based tool for public administrators seeking better access to data, to a mobile app that functions as an electronic museum guide for cities, these tools and techniques may bolster public outreach.

3.3. PARTNERSHIPS

3.3.1. INTRODUCTION

While the civic engagement process seeks diverse ideas to inform NHA planning, partnerships allow for the projects proposed in an NHA management plan to be implemented. We find that while some NHAs have very few partnerships (1-10) and others report a large number of partnerships (100+), all NHAs rely on partnerships to carry out the mission of the NHA. Successful partnerships may provide a variety of services, from extending programs to the regions and communities within the NHA, to providing additional resources and expertise. South Park NHA describes the role of partnerships as follows: "Partnerships require that the partners on projects and programs communicate and collaborate on their progress, successes, and failures. A key function of the Heritage Area will be to serve as a clearing house for organization, information, technical assistance, marketing, and promotion (South Park NHA Management Plan, pp. 29)."

Though all NHAs report the value of partnerships, descriptions of numbers and terms of engagement varies greatly. Without consistent data to analyze, this section instead highlights key considerations around partnerships and bright spot examples. It is organized as follows:

1. Types of Partnership Agreements
2. Purpose for Building Partnerships
3. Types of Partner Entities
4. Partnering with Diverse Groups

3.3.2. TYPES OF PARTNERSHIP AGREEMENTS

NHAs use a range of agreements, from informal to contract, when working with partners. The type of partnership agreement may determine how formal, established, legally-binding, or long-lasting the roles and expectations are for both the NHA and prospective partner. Not all NHAs report the level of formality for each partnership, so we are unable to summarize the number of partnerships that fall within each of these categories. However, we find that even if the formality of a partnership is not reported, many NHAs consider carefully the appropriate type and formality of agreement when developing a partnership. Mississippi Delta NHA defines four different types of partner agreements which we have summarized in Table 7.

Table 7. Types of NHA Partnership Agreements

TYPE OF PARTNERSHIP AGREEMENT	DESCRIPTION
Informal	An informal agreement that relies on the good will of partners. Not legally binding. Also known as a handshake agreement.
Memorandum of Understanding (MOU)	A legal document describing an agreement between partners. The document defines common goals. More formal than a handshake agreement, but it lacks the power of a contract.
Memorandum of Agreement (MOA)	Also known as a cooperative agreement, the document defines a project to be developed by partners and specifies the responsibilities of each partner. Can be a binding legal document.
Contract	A legally binding agreement that has been offered and accepted by partners.

Source: Mississippi Delta NHA Management Plan, pp. 226

Many coordinating entities utilize informal partnerships to carry out programs and activities within the NHA. For example, Yuma Crossing NHA was able to undertake significant project work with the Quechan Nation without a formal agreement. In 1914, the city of Yuma built a bridge for the Quechan Nation to cross the Colorado River, but it was closed for safety reasons in 1988. In 1999, the City of Yuma, Yuma Crossing NHA, and the Quechan Indian Tribe began collaborating to fund the restoration of the bridge, which reopened in 2002. This partnership was successful without a legally binding contract due to the mutual interest in the project and trust between the two entities. Another example of an informal arrangement is that with volunteers. Mississippi Delta NHA used volunteers to assist inventory collection at heritage area partner sites. Volunteers were able to best match their interests and skills to assist the NHA in furthering its mission.

Formal partnerships, including MOAs, MOUs, and contracts, allow for a binding relationship and can address more complex forms of engagement. For example, Mormon Pioneer NHA entered a MOA with the city of Mt. Pleasant, Utah. The MOA defines Mt. Pleasant as the chair community and fiscal agent of the Utah Heritage Highway 89 Alliance. The MOA helps set rules and boundaries of the relationship between Mt. Pleasant and the Utah Heritage Highway 89 Alliance and provides checks and balances for both entities. Sangre de Cristo also maintains a MOU with the NPS for assistance with its BOD operations. The MOU provides a framework for collaboration and sets clear expectations for both entities.

3.3.3. PURPOSES FOR BUILDING PARTNERSHIPS

NHAs develop partnerships for a variety of reasons through a number of arrangements. With the understanding that myriad partnership models exist on a complex spectrum, we attempt to simply categorize types of partnerships revealed in our analysis to illustrate the available options. According to our taxonomy, NHAs engage with partners when motivated by projects, resources, information, or geography. See Table 8 for a definition of each category. We find that the roles partners play within the NHA generally fall within each of these categories, and approaches to initiating and developing partnerships vary based on the purpose.

Table 8. Types of NHA Partnerships

TYPES OF PARTNERSHIPS	PURPOSE
Project-Based	NHA provides project for a partner to complete. Partner collaborates with NHA until project is completed.
Resource-Based	The NHA and partner share financial or physical resources such as offices or equipment.
Information-Based	NHA relies on relationship with partner for information.
Geography-Based	NHA distributes specific tasks by town or county to provide input on management planning process.

Project-based partnerships are an excellent tool to create new working relationships. Accomplishing something together allows partners to build trust and collective ownership, a necessary step when reaching out to historically excluded groups or in order to mend strained relationships. The process of realizing shared priorities can unify organizations traditionally at odds. For example, in the face of opposition from the farming community, Yuma Crossing NHA began a wetland restoration project by requesting contractor bids for riparian soil work. They hired a farmer and relied on his expertise

with floodplain planting; as a result, a single farmer contributed 110 restored wetland acres in one year, a more than 300 percent increase from the year preceding. This collaboration resolved much of the farmers' mistrust by acknowledging their contributions and offering them ownership in the NHA vision.

Resource-based partnerships support NHA activities with funding, infrastructure, and staff sharing. Such partnerships may be founded out of necessity (e.g., a coordinating entity doesn't possess the necessary operational efficiency or capacity for NHA management) or convenience (e.g., a coordination entity has worked closely with an organization in the past). This type of partnership builds capacity and helps NHAs realize efficiencies as the heritage area curator. The coordinating entity for Blue Ridge, the Blue Ridge NHA Partnership, developed an agreement with the North Carolina Department of Commerce to engage heritage resource officers in leading initial outreach for the management plan. Additionally, this resource-based partnership was utilized to fulfill the one-to-one federal funding match required by the NPS. In another example, the Mississippi Hills Heritage Area Alliance created a relatively unique funding structure, requiring NHA partnering members to pay dues. These members, such as local tourism agencies, help the Mississippi Hills NHA reach their federal funding match, and in return, partners benefit from the increased tourism attracted to the NHA.

Information-based partnerships benefit an NHA coordinating entity by taking advantage of existing efforts and working knowledge of established organizations in the region. By maximizing extant heritage information, an NHA coordinating entity augments its ability to play the role of NHA administrator. A clear instance of information-based partnering comes from the Journey Through Hallowed Ground Partnership, the coordinating entity of the Journey Through Hallowed Ground NHA. To capture useful ideas about the heritage area, the entity created committees for all kinds of stakeholder types, with the objective of culling useful information from experts. In particular, the NHA harnessed the marketing of fifteen different tourism boards in each county to create a regional marketing approach.

Geography-based partnerships arise commonly in NHA management plans. This partnership structure adds value by reaching otherwise unrepresented voices across the span of an NHA. Approaches for dispersing NHA influence include partnering by county, town, or community. The local heritage councils that informed the Blue Ridge NHA management plan are an example of Geography-based partnership. In developing collaborations by county and the Qualla Boundary, Blue Ridge NHA was able to jump start their heritage resource inventory while their partners were able to contribute ideas no matter proximity to the coordinating entity. The Mormon Pioneer NHA also created geography-based partnerships with five heritage districts and six counties. This model of bottom-up land management allowed Mormon Pioneer greater agility and responsiveness to project ideas. Partnering with county commissions allowed the NHA coordinating entity to collected local input and early buy-in through grassroots engagement.

3.3.4. TYPES OF PARTNER ENTITIES

Due to the fact that NHAs advance an immense variety of goals, projects, and programs, coordinating entities often lack capacity to individually address their strategic missions, and must partner with different types of organizations to succeed. Since NHAs are inter-jurisdictional by nature, working with a group from the private, government, or community sector may be the only feasible way to complete a project. Types of organizational partners vary as widely as the NHAs that pursue them,

but a few recurring types of groups are worth reporting. This section presents a few highlights of characteristics of partner entities; refer to *Appendix H* for greater detail and more examples.

Historical societies and tourism boards are commonly held partnerships used to advance heritage interpretation and marketing. Local historical societies hold immense knowledge of regional stories that can jump start the theme selection process. Existing public or private tourism entities can assist with communicating to the broader public and potential visitors.

As the overseeing agency, the NPS holds the foundational expertise in NHA management. Many coordinating entities report that better relationships with local and regional NPS staff provide advantages in the planning process. Other federal, state, and municipal agencies, especially public land managers like the US Forest Service, are essential partners for input on strategic approaches and in project implementation. Native nations hold indispensable knowledge of local landscapes and can offer insight into interpretation and active management.

When conducting outreach to particular communities, many NHAs seek partnerships with grassroots organizations, city governments, and academic institutions. Community groups and city staff may maintain the relationships needed to reveal local stories, while university professors may have expertise in local landscapes and histories.

3.3.5. PARTNERSHIPS WITH DIVERSE GROUPS

Building partnerships across divides of culture, race, ethnicity, political affiliation, or other differences demands more effort than when working with familiar organizations. Our analysis reveals few exemplary barrier-bridging partnerships, suggesting that this remains a challenging task for NHAs, though we recognize that our sample of NHAs, biased toward rural Western regions, may exclude useful success stories.

Yuma Crossing is one of those exemplary models, successfully establishing relationships with the Quechan Indian Tribe and the skeptical agricultural community, both through intentionally selected projects, as described elsewhere in this report. The Cherokee Nation were involved prior to the designation of the Blue Ridge NHA, a model not available to already formed NHAs. In another example, two regional universities originally bid for the right to be the coordinating entity for the Mississippi Delta NHA. Mississippi Valley State University, a historically black university, did not win the designation. In an area already challenged by racial tension, a project-based partnership between the Delta Center and Mississippi Valley State University allowed Mississippi Valley to not only be incorporated into the planning process but to provide leadership on a specific task.
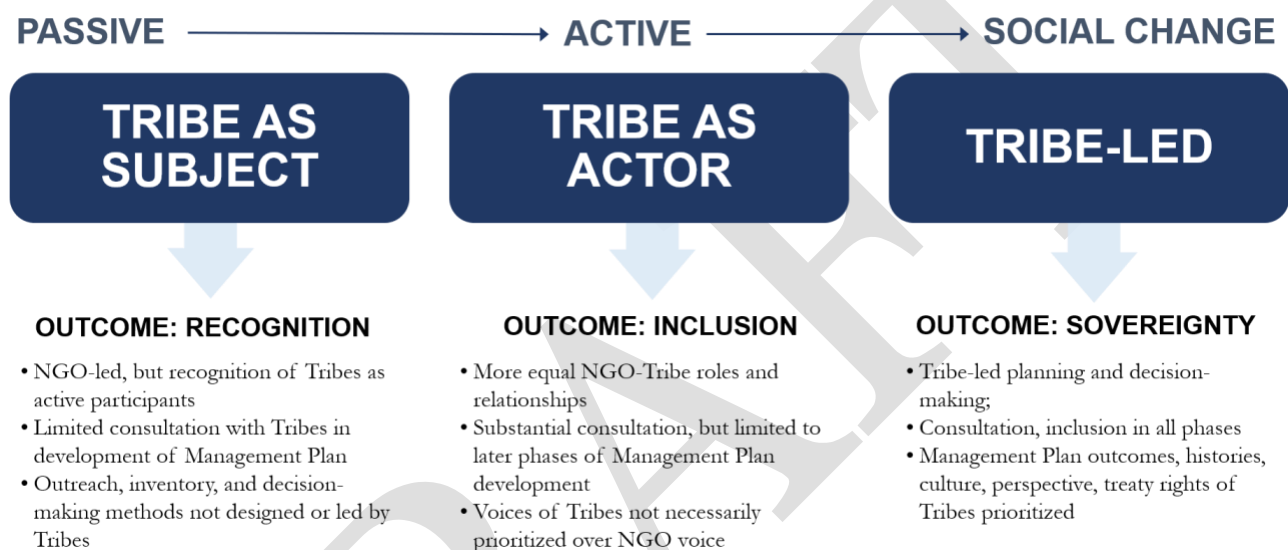
3.4. NATIVE NATIONS

3.4.1. INTRODUCTION

Indigenous peoples are the original inhabitants of all landscapes in the United States, making their stories central to any interpretation of local heritage. Though most NHA management plans mention Indigenous history, it is often unclear if the material originates from experts in the subject matter. As shown by the Cherokee in the Blue Ridge NHA, Native nations can lead the interpretation of their own history and culture as partners in the planning process. The richness and authenticity of this Tribe-led interpretation far exceeds that which could be achieved through the legal minimum – an NPS consultation with any affected nation at the beginning of the environmental review process.

The analyzed subset of 11 NHAs reveal a wide range in the level of engagement with Native nations, producing a similar range in outcomes. We find it useful to conceptualize engagement with Native nations through a framework developed for participatory research by Jo Aldridge. Though a NHA-sovereign nation relationship is much different from a researcher-vulnerable population relationship, the coordinating entity holds a particular power over the management plan process, so an adapted approach provides some fruitful analysis. Aldridge's framework notes four levels of engagement 1) Participant as Object, 2) Participant as Subject, 3) Participant as Actor, and 4) Participant-Led. We organize our findings into a model adapted for NHA coordinating entity engagement with Tribal nations. We provide a visualization of Aldridge's framework below in Figure 4.

Figure 4. Engagement Model: Involvement of Tribal Governments in NHA Management Planning

PASSIVE ———————————→ ACTIVE ———————————→ SOCIAL CHANGE

TRIBE AS SUBJECT

TRIBE AS ACTOR

TRIBE-LED

OUTCOME: RECOGNITION
- NGO-led, but recognition of Tribes as active participants
- Limited consultation with Tribes in development of Management Plan
- Outreach, inventory, and decision-making methods not designed or led by Tribes

OUTCOME: INCLUSION
- More equal NGO-Tribe roles and relationships
- Substantial consultation, but limited to later phases of Management Plan development
- Voices of Tribes not necessarily prioritized over NGO voice

OUTCOME: SOVEREIGNTY
- Tribe-led planning and decision-making;
- Consultation, inclusion in all phases
- Management Plan outcomes, histories, culture, perspective, treaty rights of Tribes prioritized

3.4.2. TRIBE AS SUBJECT

Following Aldridge's model, the Tribe-as-Subject form of participation involves limited consultation, but the methods of engagement are determined entirely by the coordinating entity.

During the management planning process, most coordinating entities make an attempt to contact Native nations for input as required in the NEPA process, but continued relationship-building efforts are often limited. We find that coordinating entities that mostly rely on remote communications and no in-person contact did not have active Tribal involvement in the planning or implementation phases.

For example, South Park NHA sent a letter to the Ute and Puebla Nations in the area requesting comment within 60 days and were disappointed to not receive an answer. South Park had hoped to interpret the long Ute history in the region, and has conducted stewardship on local archaeological sites, but has not established a connection with the Ute Nation. Kenai Mountains NHA reports a comparable difficulty in creating a connection with a tribal government. During the management planning process, Kenai Mountains NHA presented and asked for feedback on the NHA at one Tribal conference. During and after plan development, the coordinating entity sent repeated invitations to the Cook Inlet Tribal Council and has received minimal response. Similarly, Freedom's Way NHA states an intention to "Periodically inform tribal nations... about progress on the management plan," but reports no active involvement of those Tribes.

3.4.3. TRIBE AS ACTOR

The Tribe-as-Actor style of participation is a more active attempt at inclusion, entailing more equality in the Tribe-coordinating entity relationship. We identify isolated aspects of this form of engagement in two NHAs.

In developing their management plan, the Mormon Pioneer NHA contracted with Emery Polelonema, a planner from the Six County Association of Governments and member of the Hopi Tribe. Polelonema made two editorial reviews of management plan drafts and agreed to serve as a Native American ombudsman, assisting with a 2009 meeting with the Koosharem Band of Paiutes. On the Mormon Pioneer Advisory Board, a Tribal council member holds the same status as a county commissioner. Mormon Pioneer NHA's engagement constitutes a more active level of consultation and involvement in decision-making.

The Yuma Crossing NHA and the Fort Yuma Quechan Indian Tribe established a productive partnership only after NHA leadership proved trustworthy through repeated in-person meetings on the reservation and followed through with a willingness to pursue Quechan priority projects. Yuma Crossing NHA leaders stressed the importance of recognizing Tribal sovereignty and taking time to listen to and understand grievances and sources of mistrust between Tribes and state or local governments. After jointly funding the restoration of an historic bridge, the Quechan and NHA partnered on a series of complex and extensive wetland restoration projects.

3.4.4. TRIBE-LED

We find that successful partnerships with Tribal governments require meaningfully sharing power in the planning process and cultivating interpersonal and inter-organizational trust. Governance structures that share decision-making authority with Tribal governments, paired with long-term, robust relationships, can facilitate authentic and creative interpretation of Tribal heritage.

In the Blue Ridge NHA, the Eastern Band of the Cherokee Indians involvement pre-dates the NHA. Prior to pursuing NHA designation, the Cherokee were actively working with several local councils to create an interpretive plan for the Cherokee Heritage Trail. Blue Ridge was able to support this effort through the NHA process. Authorizing legislation for the Blue Ridge NHA mandates a seat on the board for a Tribal member, though the management plan exceeds that minimum by allowing the Cherokee Nation to appoint multiple board members and representatives to NHA committees and the board. Through this relationship, the Blue Ridge NHA now incorporates Cherokee heritage as a prominent thematic pillar of the interpretive strategy.

CHAPTER 4: ANALYSIS & RECOMMENDATIONS

Following our analysis of NHA management plans, interviews with coordinating entity staff, interviews with consultants, and additional literature, we provide the below recommendations for the management planning process. We tie our recommendations to the framework developed in our Findings section, with the following structure:

1. Overarching
2. Coordinating entity
3. Civic engagement
4. Partnerships
5. Tribal involvement

Borrowing from exemplar plans we encountered and adhering to NPS guidelines, we include a draft plan outline in *Appendix A*, noting key components and sections as well as critical information that is frequently included in each NHA as encouraged by NPS standards. The draft plan outline is not intended to replace strategic management planning or for use as a drag-and-drop template.

4.1. OVERARCHING RECOMMENDATIONS

Throughout our analysis of management plans and in stakeholder interviews, we tracked a series of noteworthy concepts that transcend categorization because they arise repeatedly and consistently throughout many phases of management planning. We present these ideas as overarching recommendations for consideration across the three-year lifecycle of NHA management planning.

4.1.1. UNDERSTAND THE PLAYERS IN THE GREENWAY

Conduct Stakeholder Analysis

We recommend conducting a stakeholder analysis to understand the network of individuals, communities, and organizations that care about what happens to the Greenway landscape. Identify what groups are currently working and living within the boundaries of the Greenway landscape, or working in the Greenway Trust, and what groups ought to be brought in. It may be useful to conduct stakeholder analyses within relevant categories, such as for entities within the NHA and for the Greenway BOD and staff interests. A careful inventory of stakeholders will help visualize the political environment facing the Greenway Trust as it seeks NHA designation. The exercise of stakeholder mapping forces a holistic look at the many and varied players facing any policy situation and matches well to the objective of the NHA program—to create community-led conservation and development.

Conduct Program Analysis

To dovetail a stakeholder analysis, we suggest conducting a program/project analysis to identify what specific services the Greenway Trust is currently providing and what other types of programming will need to be added to meet the organizational responsibilities of NHA designation. The role of the coordinating entity can be delicate—a balance between the internal capacity to guide heritage area management and the external ability to complement and augment existing heritage conservation. It will be critically important to comprehend which elements of the Greenway Trust's current functions are relevant to the NHA and which are not. We caution that assuming the job of coordinating entity

brings with it complicated and nuanced governance challenges. As such, it is paramount that once the Greenway landscape achieves designation and undergoes management planning, the Greenway Trust is structured for an easy transition, so the organization can focus on what matters to NHA management and commit fully to the new responsibility of coordinating entity.

4.1.2. OPTIMIZE DESIGNATION BY TAILORING THE NHA PROGRAM

Expand External Capacity for Support

We recommend establishing early connections with potential consultants, the Alliance of National Heritage Areas (ANHA), and the NPS. Conducting the management planning process is incredibly resource-intensive, and nearly all NHAs enlist the help of consultants at some point to help complete the work. As discussed in specific recommendations below, consider consulting firms with ties to local communities and underrepresented groups; representation goes a long way to build understanding and trust, especially with activist groups and Native nations that may be prone to frustration and confusion about NHA designation. To further develop a support network for the burden of NHA management, the Greenway Trust should consider getting familiar and working together with the ANHA, the NHA Program's membership organization. The Alliance members possess deep knowledge about what it takes to be a successful Heritage Area and may be an excellent source of guidance and partnership throughout management planning and beyond. As the authorizing agency that is most knowledgeable about NHAs and that ultimately approves the management plan, the NPS is an essential partner through the process. We recommend establishing relationships with staff at the NPS program office and with the only NPS unit within the Greenway, the Klondike National Park.

Adjust Management Planning to Fit Organizational Needs

Longer-lived heritage areas have typically benefited from more robust federal support and, in many ways, have set precedent and expectation for the operations of the designations that have followed. The funding landscape for the NHA Program is far reduced today, and the flavors of NHAs have diversified since the early days when designations were often rooted to historic battle sites. It is important to recognize the Greenway landscape as a modern NHA, and therefore, the standards set forth by NHA designation and management as living concepts. We recommend examining the Greenway landscape closely to figure out which elements of suggested NPS activities do and do not fit with the particular characteristics of the region. It is unwise to include everything that previous heritage areas have done because capacity and context vary. To get the most out of designation, tailor the NHA program to the needs of the Greenway landscape. As a brief example, consider the choice of the Freedom's Way NHA to forgo utilizing highway signs to identify the area. While most NHAs that predate Freedom's Way use such branding, it makes little sense to the Area's coordinating entity, the Freedom's Way Heritage Association, because of the confluence of low federal funding, sprawling geography, and the rise of digital wayfinding technologies.

In a related vein, it is up to the coordinating entity to interpret the themes established during the feasibility study. The Greenway Trust should feel empowered to branch out or away from the themes as stated if it makes for more accurate representation of the Greenway landscape's heritage, as long as themes are based on a verifiable assemblage of extant resources meeting NPS standards. The management plan is a living document that is designed to reflect current regional knowledge.

Simplify to Meet Challenges

Finally, we offer general reminders as the Greenway Trust builds a strategy for management planning. While we recognize that these sentiments may seem trite, distilling to a few simple principles can help anchor a coordinating entity through the challenges of management planning.

- *Narrow scope*: an NHA that tries to do too much risks losing local support and can create redundancies in heritage services.
- *Simplify the process*: find interpretive themes that work for constituents and work for the plan, and use these themes to guide interpretation throughout the management plan.
- *Clarify message*: determine at its core what an NHA will do for the community and what it will do for the Greenway Trust.
- *Figure out funding*: developing a management plan is an involved process and organizations that lack adequate financing tend to rush; conducting a low-quality process is a recipe for disappointment.
- *Be wary of personalities*: NHA designation is exciting and it will be the job of the Greenway Trust as coordinating entity to control direction and ensure that not just the powerful personalities get to guide the process.
- *Rely on many leaders*: it is not advisable to overly depend on one or a few leaders for management planning; coordinating entities that can spearhead the process equitably among several champions will be set up for sustainable heritage area governance going forward.

4.2. COORDINATING ENTITY

If the Greenway receives NHA designation, the Greenway Trust intends to serve as the Congressionally-designated coordinating entity. This means that the Greenway Trust will be responsible for conducting the three-year management planning process, developing the management plan, and overseeing the NHA for the foreseeable future. Based on our analysis of existing NHAs and findings related to the unique role coordinating entities must play, this section contains recommendations that the Greenway Trust may consider in anticipation of the Greenway landscape receiving NHA designation. Specifically, this section contains recommendations for the Greenway Trust to consider during the management planning process, and recommendations for the Greenway Trust to consider throughout both the planning process and ongoing management of the NHA.

4.2.1. RECOMMENDATIONS FOR CONDUCTING MANAGEMENT PLANNING

Build relationships

One important role that the coordinating entity may fill is the facilitator of all NHA-relevant activities, projects, and programs within the NHA. While coordinating entities may provide their own NHA-specific projects and programs, the entity is not expected to provide all of the NHA services alone. Instead, successful NHAs have coordinating entities that effectively build and maintain relationships with other entities in the area that provide NHA-relevant services. While many of these relationships may be built through the civic engagement process, we recommend that the Greenway Trust begin building these relationships prior to receiving NHA designation. Specifically, the Greenway Trust should identify entities within the Greenway landscape that are already providing services relevant to the goals and themes of the NHA, even if all of these themes are not yet fully understood.

As stated in the general recommendations above, the Greenway Trust should conduct a stakeholder analysis of the different entities within the Greenway landscape that are relevant to the Mountains to Sound Greenway NHA's goals and themes. The Greenway Trust should then identify entities that the Greenway Trust does not have an existing relationship with, and identify opportunities for potentially beginning to build relationships. These relationships do not yet need to be informal or formal partnerships based around projects, information, or resources. Instead, the Greenway Trust should aim to build connections with individuals within some of these entities, and to begin discussions around the Greenway landscape, the forthcoming NHA designation, and the three-year management planning process.

Identify Niche Role

In addition to learning more about the roles that other entities fill within the Greenway landscape, the Greenway Trust should begin to consider how it will fill a niche role within the area rather than duplicating the efforts of others. If the Greenway Trust is able to begin building relationships with NHA-relevant entities throughout the Greenway landscape, the Greenway Trust may become better prepared to identify this niche role within the NHA. Because the Greenway Trust's current services primarily focus on natural resource conservation and outdoor recreation, the Greenway Trust may not be best suited to adopt and disseminate other NHA-relevant programming such as historic and cultural interpretation, tourism, and education. Furthermore, many of these activities may already be offered through other entities, or these other entities may be better suited to provide these services in the future. The Greenway Trust should begin to identify what NHA-relevant programming it will provide, and which activities it may rely on other entities to provide. If the Greenway Trust is able to 1) build relationships with NHA-relevant entities across the Greenway landscape and 2) identify NHA-relevant services that are better provided through other entities, then the Greenway Trust may begin to identify the niche role it will play as a coordinating entity within the NHA.

Refer to Previous Management Plans & Hire a Consultant

Finally, when the Greenway Trust begins the management planning process, we recommend that the Greenway Trust build on lessons-learned from previous NHAs in two ways: 1) consult other NHAs for advice and refer to existing management plans for suggested templates; and 2) hire a consultant that has supported previous management planning processes. To address the former, we have created a draft management plan template which accompanies this report. This management plan template is arranged in a similar order as previous, exemplar NHA management plans; it also includes a compilation of bright spot examples from existing management plans and best practices suggested by the NPS. We recommend that the Greenway Trust refer to this management plan template at the beginning of the management planning process to identify the general information that should be contained within the management plan, and for inspiration for how to present the information.

Regarding the latter recommendation (to hire a consultant), we recommend that the Greenway Trust begin to identify potential consultants prior to the management planning process. The Greenway Trust will need to determine if this consultant will oversee the entire management planning process or only a portion, such as reviewing other entities' strategic plans or identifying the NHA inventory. We recommend that whether the consultant lead the entire planning process or only a portion, the Greenway Trust should lead the in-person civic engagement process to ensure the organization builds meaningful and lasting relationships with communities throughout the NHA. While the Greenway Trust should rely on the consultant's knowledge of the management planning process, it is best to maintain the organizational vision and control throughout the process. While consultants may

understand the best practices and standards for collecting information and drafting the report, the Greenway Trust understands the culture and needs of the region and its inhabitants.

4.2.2. CONSIDERATIONS FOR ONGOING MANAGEMENT OF NHA

This section contains changes that the Greenway Trust may experience as an NHA coordinating entity. We recommend that regardless of whether the Greenway Trust is able to act on all of these changes, the Greenway Trust should consider the potential impact of these changes before, during, and after the management planning process.

Changes to Management and Implementation Activities

While the coordinating entity is not expected to provide all NHA-relevant programming within the NHA, we find that most or all of existing coordinating entities' efforts are focused on the management of the NHA. Because of this, the Greenway Trust may find that the NHA designation will impact current programs and services offered. Changes may result because the Greenway Trust will need to allocate more resources to the management of the NHA; the Greenway Trust may need to augment existing or add new programs that are more relevant the NHA; and the Greenway Trust may need to reduce or drop programs that are currently offered. These changes will depend on the resources that the Greenway Trust acquires through NHA designation, the contents of the NHA management plan, and the partnerships that the Greenway Trust builds with other entities. However, we recommend that the Greenway Trust begin to consider how it may expect to prepare for and respond to these potential changes.

One change that the Greenway Trust may anticipate is that the NHA designation itself will provide recognition to the Greenway landscape and the NHA programming within the area. We recommend that the Greenway Trust consider that, while the NHA designation has the potential to attract more attention, tourism, and funding to the area, that much of this will depend on the coordinating entity. We therefore recommend that the Greenway Trust consider not only how it will manage the NHA, but also how it will market the NHA. The Greenway Trust may need to allocate significant resources to become the "voice" of the NHA.

Finally, while successful NHAs rely heavily on effective partnerships between the coordinating entity and other entities throughout the area, NHA designation itself does not guarantee cooperative future planning. Many NHAs report that their ability to coordinate with communities within the area is enhanced after NHA designation, and that projects that have occurred post-NHA designation would not have been possible prior to NHA designation. However despite this enhanced coordination, the Greenway Trust should consider that its role will primarily be in the coordination of projects, while other entities may carry out the on-the-ground implementation of projects. Furthermore, many NHAs that do effectively promote collaborative planning primarily focus on infrastructure projects such as building bike pathways, creating interpretive byways and trails, and revitalizing historic sites. Given the Greenway Trust's focus on collaborative public and private land management, we find that this is not a primary focus of previous NHAs. This does not mean this land management is not possible within the scope of the NHA, however the Greenway Trust would need to set a precedence for this type of NHA coordination rather than learn from existing NHA's methodologies.

Changes to Staff and Board of Directors

To reflect the changes to programming listed above, the Greenway Trust may find it necessary to change the structure of the staff to support these programmatic changes. For example, the Greenway

Trust may need to hire more or allocate current staff capacity to building and maintaining NHA-related relationships and partnerships, specifically those related to historic and cultural interpretation. Furthermore, we recommend that the Greenway Trust consider changes to its BOD that reflect the priorities of the NHA and can support sustained governance. While the BOD reflects the Greenway Trust's current focus on conservation and outdoor recreation, a BOD for the Greenway Trust may also need to reflect interests in historic and cultural preservation, interpretation, and tourism. Additionally, the Greenway's BOD will be strongest if it represents the many communities within the NHA, such as tribal nations. While we do not recommend changes to be made at the current moment, after the Greenway Trust conducts the stakeholder analysis and begins to build relationships with different entities throughout the area, the Greenway Trust may consider how the internal staff and BOD capacity reflects the external partnerships and goals of the NHA.

Changes to Funding and Administrative Responsibilities

Because much of the Greenway Trust's responsibility as the coordinating entity will be to manage relationships and partnerships within the NHA and to ensure compliance with NPS requirements, we recommend that the Greenway Trust consider how NHA designation will impact the Greenway Trust's annual reporting procedures. Many NHAs report that NHA designation requires additional federal reporting and oversight which may be more burdensome than coordinating entities originally consider. The NHA designation may also attract more resources, however this additional funding is not always as great or consistent as NHAs initially anticipate. The Greenway Trust should consider that while the NHA designation will add to administrative responsibilities, both in reporting and in attracting additional funding, however the designation may or may not attract additional, significant funding and resources to support these administrative changes.

4.3. CIVIC ENGAGEMENT

Within three years of congressional designation, a NHA coordinating entity must develop a management plan to guide management of the designated area for the following ten years. Once authorized by the Secretary of the Interior, this management plan functions as a living guideline for the coordinating entity for overseeing their NHA. As part of the planning process, the Greenway Trust will be expected to conduct a civic engagement process. In this section, based on our analysis of existing management plans as well as conversations with NHA staff and planning consultants, we will present recommendations for consideration by the Greenway Trust for leading civic engagement throughout management planning as well as recommendations for general civic engagement within the first ten years of designation.

4.3.1. PREPARING FOR CIVIC ENGAGEMENT

Apply Stakeholder Analysis

The Greenway landscape spans a multitude of geographies and cultural environments, stretching from the more metropolitan King County through the North Cascades and into rural Kittitas County. Throughout, the area encompasses the historic and lived territories of the Coast Salish Tribal Nations. To grasp the complex demographic landscape facing the Greenway Trust during civic engagement, we recommend leveraging a stakeholder map. This tool will be particularly useful in preparation for outreach activities, when a coordinating entity is expected to consider and incorporate input about heritage interpretation from their constituency. We recommend considering different engagement strategies depending on region since, for instance, people in Seattle will likely have different needs and concerns from people living in Ellensburg about the effects of NHA designation. Additionally, a thorough stakeholder analysis will help the Greenway Trust anticipate opponents or groups that might feel threatened by designation, setting realistic expectations about potential for public backlash.

Conduct Power-Mapping

To complement a stakeholder map, we recommend power mapping, a technique that will allow the Greenway Trust to identify key individuals who can help promote social change. These influencers are already involved in local communities and have the social capital necessary to ensure marginalized and hard-to-reach community members feel heard and represented in the NHA management planning process. Since the goal of a NHA is to guide the interpretation and preservation of the unique heritage of a space, identifying the trusted community representatives best equipped to gather that information will be invaluable.

Engage in Full Participation: Inform, Consult, & Involve

In our civic engagement findings, we adapted the Public Participation Spectrum from the International Association of Public Participation (IAP2) to the NHA coordinating entity's experience. We recommend using this tool as a guideline as the Greenway Trust prepares and develops a strategy for the civic engagement process. It is critical for the Greenway Trust to understand at what junctures it is advisable simply to inform the public about NHA activities versus at what points consulting or involving the public is more appropriate. Generally, throughout management planning we recommend starting with a well-dispersed information sharing phase and then following up repeatedly in each community to solicit feedback and involve individuals in decision making. For example, given the obscurity of the NHA program and its aims, we feel the public should not be expected to provide substantive comments on a management plan at the same meeting they first learn of the designation. However, the way in which the Greenway Trust elects to build out its engagement strategy as the NHA's coordinating entity will depend on particular organizational knowledge of the area.

4.3.2. CONDUCTING THE CIVIC ENGAGEMENT PROCESS

Overall, we recommend the guiding principle for the Greenway Trust's civic engagement process should be to surface local stories because it can set your organization up well for establishing project-based partnerships. In addition, dedication to collecting stories will make interpretation of NHA heritage more unique and appropriately tailored to the demographics of the Greenway landscape. Through story collection, the Greenway Trust will find it easier to identify the interpretive niche that is not already being told in the Greenway landscape. NHAs we spoke with corroborate the value of local story-gathering and indicated it was a powerful approach to finding narratives their coordinating entity could highlight and organize around.

Invest Time in Relationships

In our research, and especially in anecdotal evidence collected in interviews with NHA staff and NHA consultants, we uncovered the importance of building relationships during civic engagement. We recommend the Greenway Trust make consistent effort to engage the public in management planning through face-to-face interaction by putting time into grassroots outreach. Generally, we feel the quality of public participation during civic engagement is directly linked to the amount of effort a coordinating entity commits to creating personal connections.

Public outreach is a challenging task because good outreach demands a lot of resources, and as a result, it is much easier to fall into the trap of poor public outreach, which can cause severe deficiency in a coordinating entity's ability to leverage NHA designation. We recommend avoiding sending one-off email blasts as a way to inform stakeholders. This approach is cheap and easy, but it alone cannot accomplish the depth of engagement required for NHA management planning. Instead, plan for time-intensive civic engagement and budget accordingly.

Reach Communities

We recommend going into communities and using familiar ambassadors to engage specific groups. A coordinating entity should strive to deploy people on the ground who represent or have relationships with the diverse constituency of the Greenway landscape, being careful to consider needs across ethnic, racial, socioeconomic, and cultural lines. Further, it is unreasonable to expect high quality engagement if the Greenway Trust asks constituents to show up at locations that are convenient for the organization. Instead, we recommend hosting public engagement activities in areas comfortable and recognizable to specific groups, especially when trying to reach communities that may distrust public lands programs, such as private property rights activists, or other groups who may feel inherently wary of government programming.

Build Capacity for Engagement

We recommend thinking about ways to build out capacity for a strong civic engagement process. Many NHAs hire consulting agencies to support this work, which we find is a useful way to expand operational capacity that doesn't require hiring additional staff. The consultant, however, should be responsible for most of the internally-facing activities such as process management, data collection, inventory gathering, and coordination, but the Greenway Trust staff and partners should be doing face-to-face engagement and building relationships. Once the management plan is complete, Greenway Trust staff will have built the social capital a coordinating entity needs throughout NHA management while the consultant will have enabled the background operations for developing strong public relationships.

4.4. PARTNERSHIPS

Begin to Build and Leverage Trust

The Greenway Trust will require strong partnerships to meet its goals in all phases of the NHA. Partnerships will also ensure that the management planning process is sound. The Greenway Trust is in a capable position to have robust partnerships given its broad list of supporters of the NHA and its work as a pre-existing entity. Therefore, we recommend that the Greenway Trust begin leveraging relationships within its existing coalition to begin forming partnerships pertinent to the goals of the

Mountains to Sound Greenway NHA. Entities that the Greenway Trust already have a rapport and an established relationship with will be more understanding and familiar of the missions, values and goals of the Greenway Trust. These entities will be better equipped and more likely to provide effective partnerships.

Partner with Historical & Tourism Societies

Specifically, historical/tourism societies will provide significant information in the management planning process. We recommend that the Greenway Trust partners with historical/tourism societies, as they can help increase attendance, awareness, and historic preservation of the NHA and surrounding attractions. By building relationships with historical/tourism societies early, the Greenway Trust can begin building its inventory, as well as collaborate on consistent messaging for the NHA. Consistent messaging and branding across partnerships will provide cohesion for the Greenway Trust and visitors.

Maintain Partnerships

We also recommend that the Greenway Trust be prepared to invest significant resources into maintaining partnerships. With different types of partnerships and variations in formality, it will take critical coordination to engage with partners and oversight is necessary to ensure that partnerships are maintained and fruitful for both parties. These resources could come from hiring additional staff or reallocating some of its current workforce to focus on maintaining or seeking out new partnerships.

Employ Strategic Formality

Because the formality of partnerships varies from partner to partner, we recommend that the Greenway Trust take time to identify and craft what level of agreement will be best for each partnership. While some partnerships will be successful with a "handshake" agreement, legal contracts and Memorandums of Understanding may be needed to flesh out commitments between the Greenway Trust and other partners to ensure beneficial partnerships.

Include Diverse Partnerships

The goal of diverse partnerships is to provide programming, services, and interpretation into the communities that these organizations represent. We recommend the Greenway Trust formulate a strategy about who and what partners they choose to engage with before beginning the partnership process. Making a strategy will enable the Greenway Trust to find diverse perspectives that could benefit from more engagement. The strategies will be key to maintain trusting and long-term partnerships. Partnerships for the Greenway Trust include representatives from diverse:

- Socioeconomic backgrounds
- Geographies and levels of urbanization
- Economic sectors
- Race, ethnicities, and religions

Given the size of the Mountains to Sound Greenway and the range of ideologies within its boundaries, we expect the ability to maintain partnerships with diverse entities will take more time and intentionality. For example, stakeholders on the eastern slopes of the Cascades (Cle Elum and Ellensburg) may be wary of partnering with an entity from Seattle given differences in politics.

Partnering with stakeholders across the entire area will be vital to the success of the NHA, but also presents a capacity problem with increased demands for coordination.

4.5. NATIVE NATIONS

The Greenway landscape encompasses territory addressed in the Treaty of Point Elliott and the Yakama Treaty, which reserves hunting, fishing, and other rights within the proposed NHA for the Yakama, Tulalip, Lummi, Nooksack, Stillaguamish, Swinomish, Upper Skagit, Sauk-Suiattle, Suquamish, and Muckleshoot Nations.

Though the Snoqualmie Tribe is the only nation with a reservation located inside the NHA boundary, several nations may have overlapping usual and accustomed areas, including signers of the above treaties, as well as the Puyallup, Duwamish, and Colville Nations.

Such a strong presence of active Tribal governments offers great potential for rich and unique historical and cultural interpretation. However, based on our findings, unless the Greenway Trust acts to involve Native nations in a leadership capacity, interpretation may remain at best superficial and at worst, inaccurate and tokenizing. Also, the proven model of Indigenous land stewardship offers immense potential for restoring the balance of people and nature, but is at risk of being compromised by the management planning process. Incorporating Tribal leadership will require understanding sovereignty, building trust, and sharing power.

Special attention in the NHA should also be paid to issues of public land access for Indigenous peoples. U.S. National Forests and many other public lands qualify as "open and unclaimed" lands, where Tribes retain off-reservation treaty rights to hunt and gather, for subsistence or cultural uses. However, the NHA planning process, if it does not provide Tribal governments with meaningful decision-making authority, could erode that inherent right. We recommend the Greenway Trust conduct additional research on the potential effects of designation on treaty rights and Indigenous access to public lands, beyond the review below.

4.5.1. ESTABLISHING RELATIONSHIPS FOR PLANNING

Understand Sovereignty

A sensitivity to the perspectives and priorities of Native nations requires a deep understanding of Tribal sovereignty, Traditional Ecological Knowledge, and Indian law. To start, we recommend staff training in the fundamentals of these concepts. A firm grasp of basic legal and ethical parameters will greatly facilitate discussions with Native nations.

Build Trust

Similar to all other organization, effective partnerships require a foundation of trust. Unlike other organizations, Tribal governments have endured centuries of broken treaties, failures of the federal trust responsibility, and cultural genocide. Given this history, the Greenway Trust should expect to invest more time and care into developing a relationship, by actively showing its trustworthiness.

Share Power

Recognizing the sovereign status of Tribal governments requires an openness to sharing decision-making authority. Given lessons learned from other NHAs, the Greenway Trust should be willing to

allow representatives from Tribal governments to make decisions about the direction of interpretation programs and other projects. Sidelining Tribal governments in an advisory role will likely not facilitate the necessary trusting relationship.

A number of governance structures are available as options to facilitate shared decision-making. If the Greenway Trust is designated as the coordinating entity, the BOD should be reformed to include representatives from Tribal governments. In a April 2017 letter signed by the Vice Chairwoman Teri Gobin the Tulalip Tribes recommend that authorizing legislation should mandate that the BOD shall include "a member from each tribe that will be directly affected by a program or plan." Another option, available upon designation at the discretion of the Secretary of the Interior, would be to offer the role of coordinating entity to a Tribal government or to a joint association of Tribal governments. Native leadership of the coordinating entity is the surest path toward more sustainable land stewardship and more authentic cultural interpretation.

Center Indigenous Heritage

To combat the tendency of American history to glorify the settlement process that displaced indigenous people, Native nations should have a primary say in the development of interpretation. The undertones of the NHA program, with boundaries drawn and territory claimed under a new designation, hint at colonial practices, which offers an additional hurdle to genuine partnerships with Native nations. An ideal approach would involve Native nations from the beginning, when deciding whether or not to pursue NHA designation. Then, if endorsed, Native nations would help decide the boundaries of the NHA in a meaningful way. With boundaries in place, the next best approach will be to defer to the expertise of Native nations to accurately and authentically interpret indigenous cultural heritage. Tribe-led interpretation may be the only way to fully avoid the pitfalls of tokenizing indigenous histories while romanticizing colonialism.

4.5.2. PUBLIC LAND MANAGEMENT

Consider the Impacts of Recreation

Potentially conflicting uses of public lands is another challenge facing the Mountains to Sound Greenway NHA designation. With the number of hikers increasing even faster than the rapidly growing population, Tribal treaty-protected rights to hunt and gather are threatened by overcrowding. The Tulalip Tribes highlight this as a central concern in their letter to Senator Cantwell, writing, "With these places becoming increasingly overcrowded, maintaining these connections to our sacred places is becoming much more difficult" (Gobin, 2017). Active marketing of outdoor recreation opportunities, common in many NHAs, will likely exacerbate this conflict. Any tourism campaign must be conducting with a thoughtful consideration of impacts on traditional uses of the landscape by tribal citizens.

Avoid Interfering with the Trust Responsibility

Through the empowerment of a coordinating entity, the management planning process does potentially threaten the federal trust responsibility. Federal agencies like the USFS have a duty, enshrined in treaties and upheld in courts, to co-manage natural resources through consultation with the Tribes. If the NHA management plan usurps any management authority from the USFS and weakens the potency of Tribal input, it could be viewed as an attack on the trust responsibility. Instead, the Greenway Trust could leverage a Tribe-led NHA management plan to incorporate Indigenous

knowledge into public land management. Rebecca Tsosie (2003) offers more background and analysis on federal public land policy and Native peoples.

Incorporate Indigenous Knowledge

The ecosystems in the Greenway landscape evolved with active managed by the Indigenous peoples, so it follows that Traditional Ecological Knowledge is indispensable to sustainable management of present-day public lands.

Dr. Kyle Whyte is a leading scholar in on the topic of Indigenous perspectives on environmental management and provides an excellent overview of tried-and-true approaches to cooperation in the chapter, "Seven Indigenous principles for successful cooperation in Great Lakes conservation initiatives" (2017). The authors "offer informed insights and strategies that those interested in cooperation should consider in their actual or potential partnerships with Indigenous peoples," pertaining to the following categories:

- self-determination;
- early involvement;
- intergenerational involvement;
- continuous cross-cultural education;
- balance of power and decision-making;
- respect for Indigenous knowledges; and
- control of knowledge mobilization.

Ross et. al. (2016) offer a comprehensive assessment of the limits of standard Tribal consultation and call for a transition to an Indigenous Stewardship Model that equally respects Indigenous and Western scientific perspectives. The authors recommend harnessing the best of both knowledge systems on equal footing to reform public land stewardship, resource use, community outreach, and conflict resolution.

McAvoy et. al. (2004) present a number of recommendations for National Forest management based on research with the Leech Lake Band of Ojibwe and the Confederated Salish and Kootenai Tribes, including:

- "Managers need to be sensitive to the long history of Indian traditional use of national forests lands, and of the deep cultural/symbolic and spiritual meaning these lands hold for Indian people."

- Inform staff and public of treaty rights through "interpretive signs describing Indian traditional uses of the forest, assigning Indian place names, and signs and other interpretive materials explaining Indian treaty rights."

- "Simply consulting with tribes, where the US Forest Service retains all the power, is not going to work."

CHAPTER 5: CONCLUSION

Awaiting Congressional designation as an NHA, the Greenway Trust intends to begin preparations for the required management planning process. Engaged as a team of consultants, we reviewed all existing NHA management plans, closely analyzed a subset of 11 plans, and interviewed staff and consultants intimately familiar with the NHA management planning process. In our research, we categorize our findings and recommendations based on four topics of particular relevance. We report and analyze issues related to 1) the coordinating entity, 2) civic engagement, 3) partnerships and 4) tribal involvement. Along with findings from exemplar plans and recommendations for the Greenway Trust to consider and preparation for and throughout the management planning process, we append a draft management plan outline which adheres to NPS guidelines and contains exemplars from existing NHA management plans.

Our recommendations focus on the organizational and strategic changes necessary to step into the role of a coordinating entity. Given the duration and intensity of civic engagement, we identify the value of consultants in the planning process. Initiating and maintaining an expanded and diverse network of partners will also present a capacity challenge but is vital to the success of a large NHA. Authentically incorporating Indigenous perspectives in public land management and cultural interpretation will require sharing decision-making with Tribal governments, who hold a wealth of essential knowledge. While the Greenway Trust's position as an established entity will help them navigate the planning process and the initial years following designation, the organization will need to develop new areas of expertise, scale up existing networks, and incorporate a renewed intentionality toward partner relationships in order to authentically communicate the stories of the region.

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APPENDIX A – NHA MANAGEMENT PLAN OUTLINE

Attached as a separate document.

APPENDIX B – SCREENING CRITERIA

Characteristics of NHAs recorded during screening of all 49 existing NHAs
- NHA Name
- Location
- Year Established
- Link to Management Plan
- Name of Coordinating Entity
- Existing Coordinating Entity (y/n and describe)
- Plan Selected for Further Review (y/n)
- Reason for Inclusion/Exclusion

Themes
- Transportation (y/n and describe)
- Environmental/Natural Resources (y/n and describe)
- Native Americans (y/n and describe)
- List Other Themes

NHA Characteristics
- Access to and Emphasis on Outdoor Recreation (y/n and describe)
- Size (quantify and describe)
- Includes National Forest (y/n and describe)
- Include Major Metropolitan Area (y/n and describe)

Other
- Does Evaluation Plan Exist (y/n and describe)
- Any Other Bright Spots to Note (y/n and describe)

APPENDIX C – SUMMARY OF CODING SPREADHSEET

Introduction
- NHA name
- Location (State)
- Link to Management Plan
- Number of Counties
- Number of major metropolitan cities

Coordinating Entity
- Organization's name
- Sector (government, non-profit)
- Link to entity's website
- Year established
- Staff size
- Annual Budget (not specific to NHA)
- Proportion of organization's budget allocated to NHA
- Did organization exist prior to feasibility study?
  - (If yes) Years in existence before designation
  - Describe (if no, who conducted the feasibility)
- Was org established through NHA designation?
- Does the org serve another purpose other than overseeing the NHA?
- Mention of changes to organizational structure before and after NHA?
- Mention of changes to operations before and after NHA?
- Mention of any other changes before and after NHA?

Civic Engagement
- Kick-off Meeting
  - Quantity and frequency
  - Number of participants
  - Key questions
- Public Meetings
  - Quantity and frequency
  - Number of participants
  - Key questions
- Survey
  - Quantity and frequency
  - Number of participants
  - Key questions
- Media (non-social media)
  - Quantity and frequency
  - Number of participants
  - Key questions
- Stakeholder Interviews
  - Quantity and frequency
  - Number of participants
  - Key questions
- Committee Meetings

- o Quantity and frequency
- o Number of participants
- o Key questions
- Community Forums
  - o Quantity and frequency
  - o Number of participants
  - o Key questions
- Website Communication
  - o Quantity and frequency
  - o Number of participants
  - o Key questions
- Email and Social Media
  - o Quantity and frequency
  - o Number of participants
  - o Key questions
- Site Visits
  - o Quantity and frequency
  - o Number of participants
  - o Key questions
- Mention the entity that led the civic engagement process?
  - o Name of entity
  - o Terms of engagement (contractor, consultant, partner, etc.)
- Mentions weakness, challenges, or failures of civic engagement
- Mentions strengths and successes of civic engagement?
- Other key info
- Research highlights (economic or other key studies, info collected, etc.)
- Timeline

Themes
- List NHAs Themes
- Mentions transportation bright spots
  - o Type of transportation
- Mentions outdoor recreation bright spots
  - o Type of outdoor recreation
- Mentions natural resource/conservation bright spots

Resource Inventory
- Bright spot process/strategy for collecting inventory
- Bright spots of categories collected
- Other key information

Business Plan
- Mentions changes to the organization's business plan before and after NHA designation?
- Changes to what category (e.g., strategic plan, by-laws, board, etc.)

Relationships and Partnerships
- General quantity of partnerships
- Does the coordinating entity highlight a formal partnership/agreement (other than with NPS)?
  - o Partner organization(s)
  - o Type of agreement (contract, shared funding, etc.)
  - o Terms of agreement and services provided
- Bright spot partnerships with coordinating entity
  - o Organization(s)

- o Role/authority of partner
- Bright spot interagency partnerships (e.g., federal-state/county/city)
  - o Organization(s)
- Mentions collaboration with the US Forest Service
  - o National Forests
  - o Other partner organizations involved
- Percent of cities in NHA border as active partners
- Percent of other governments in NHA border as active partners

Tribal Involvement

- Tribal governments present in NHA
  - o Name(s)
- Tribal lands/significant areas present in NHA
  - o Reservation or culturally significant site
- Tribal involvement in NHA management plan development
  - o Name of organizations/ individuals involved
  - o Role of involvement
  - o Length of involvement
- Native Americans mentioned as key theme
- Bright spot description of history (relevant for MTS)

NHA Funding

- NHA Annual Budget
- Mention of NHA-specific funding?
  - o Source
  - o Amount
- Mention notable changes to funding before and after NHA designation?
  - o Source
  - o Amount

Other

- Risks?
- Bright spots on private property?
- Bright spots on branding of NHA?
- Bright spots for list of alternatives
- Bright spots on NHA website

Similarities of other NHAs to the Greenway

- Size/outdoor recreation/National Forest

Interpretive themes that could be used in the Greenway

- Either those highlighted in initial feasibility study or others that could potentially apply

Partnership characteristics

- Robustness of public participation
  - o Number of active partners
  - o Board involvement
- Complexity of jurisdiction
  - o Number of governmental agencies with jurisdiction
- Private industry participation
  - o Board involvement
  - o Level of private donations
  - o Involvement/support of ag/ranching community

APPENDIX D – PROFILE OF ELEVEN NHA COORDINATING ENTITIES

NHA			COORDINATING ENTITY					
Name	Year Est.	State	Name	Sector	Staff Size	Annual Budget	Established Before NHA Designation (Y/N)	Year Est.
Blue Ridge NHA	2003	NC	Blue Ridge NHA Partnership	Non-profit	5	$800,000	N	2003
Freedom's Way NHA	2009	MA	Freedom's Way Heritage Association	Non-profit	6	$840,000	Y	1994
Journey Through Hallowed Ground NHA	2008	MD, PA, VA, WV	The Journey through Hallowed Ground Partnership	Non-profit	9-13	-	Y	2005
Kenai Mountains – Turnagain Arm NHA	2009	AK	KMTA Corridor Communities Association	Non-profit	6	$245,000	Y	2000
Mississippi Delta NHA	2009	MS	Delta Center for Culture and Learning	University	3	-	Y	2000
Mississippi Hills NHA	2004	MS	Mississippi Hills Heritage Area Alliance	Non-profit	4-8	-	N	2004
Mormon Pioneer NHA	2004	UT	Utah Heritage Highway 89 Alliance	Non-profit	-	-	N	2006
Ohio & Erie National Heritage Canal Way	1996	OH	Ohio & Erie Canal Association	Non-profit	0	$438,000	N	1996
Sangre de Cristo NHA	2009	CO	Sangre de Cristo NHA	Non-profit	4	$369,000	N	2009
South Park NHA	2009	CO	Tourism and Community Development Office, Park County	Government	2	$600,000	Y	2009
Yuma Crossing NHA	2000	AZ	Yuma Crossing NHA Corporation	Non-profit	11	$2.2 million	N	2000

APPENDIX E – INTERVIEW AGENDA

TIME	AGENDA ITEM

1:00 pm   **UW Introduction**

- Student researchers introduce themselves (both the interviewer and the note taker)
- Briefly introduce project and purpose of the interview

1:05 pm   **Interviewee Introduction**

- Interviewee will briefly introduce role within NHA/coordinating entity

1:10 pm   **Management Planning Questions**

- What aspects of the NHA management planning process did you think worked especially well, and why? What resources did you use to develop your plan, and what resources were most valuable?
- What challenges did you encounter during the management planning process? If you were to conduct the planning process again, what would you change?
- During the civic engagement process, what events or activities did you find most valuable? How did you ensure that you incorporated a diversity of perspectives throughout the process?
- What partnerships were most valuable during your management planning process, and have those partnerships continued?
- What efforts have you made to monitor and evaluate your NHA management activities, and how do you measure success? How has the management of your NHA changed since developing the plan?

1:40 pm   **Organization Questions**

- Thinking about your organization when you began the NHA, what capabilities or skills were most important for the success of your efforts? Did your organization already have them? If not, how did you develop them (e.g., consultants, new staff, partnerships)?

1:55 pm   **Closing**

- Is there any other advice you would like to share with an organization that hopes to lead a new NHA planning process?
- Is there anyone else we should speak with regarding this topic?

APPENDIX F – SUMMARY OF CIVIC ENGAGEMENT IN MANAGEMENT PLANS

		CIVIC ENGAGEMENT IN SUBSET OF 11 MANAGEMENT PLANS	
Tactic	**Number of Plans**	**Community Engagement Strategy**	**Select Examples**
Public Meetings	10	Objectives vary from gathering general input about regional heritage and stories, to collecting specific information about local heritage resources and beneficial development projects. Many plans target meetings across counties and towns within the NHA.	• Almost all NHA management plans describe holding public meetings of some kind.
Stakeholder Interviews	8	Conducted with community representatives to gather information about regional roles and activities, missions, and critical issues facing the NHA	• Journey Through Hallowed Ground NHA held interviews with potential partners to gauge support and reveal perceptions of critical issues facing the area. Interviewees were asked to suggest others who might partner. • Ohio & Erie used interviews to determine candidates aligned with a specific project, task, program, or issue in management planning and asked agencies to suggest experts.
Website Communications	7	Used to engage community members and may serve many functions such as information sharing through blogs or soliciting of public comment on various planning stages	• Kenai Mountains noted that regular updates were provided via their website. • Blue Ridge directed the public to their website where elements of the plan were posted for public comment over a period of 6-9 months.

Tactic	Number of Plans	Community Engagement Strategy	Select Examples
Traditional Media Outlets	6	Include newspaper press releases, articles, or advertisements and local radio broadcasts to share information and spread awareness about planning activities	• Mississippi Hills, Mormon Pioneer, Mississippi Delta, and Kenai Mountains note regular press releases to newspaper and radio. • Blue Ridge published scoping notices in newspapers for management plan and environmental assessment. • Mississippi Hills and Mormon Pioneer used newspaper advertisements • Mormon Pioneer conduct one-hour radio broadcast to promote discussion about planning.
Committee Meetings	6	Convene local professionals, elected representatives, and interested constituents across multiple levels of government to consult on specific plan elements or provide general feedback	• Blue Ridge created an interdisciplinary team to review and critique materials generated through the plan and environmental assessment, funnel comments back to the environmental consultant, and supply data for heritage inventory • Mississippi Delta leveraged committees to lead large-scale initiatives like civic engagement, interpretation, resource stewardship, and organization/management. • Ohio & Erie used committees for specific projects like designing Canal Way signage and overseeing the Towpath Trail System, as well as large initiatives like interpretation.
Kickoff Activities	4	Include a range of stakeholders from Board of Directors to the greater community and may include meetings, public celebrations, and media publications as mechanisms for launching awareness	• Mormon Pioneer NHA produced a "kick-off edition" publication and hosted a celebration • Freedom's Way started preliminary planning work with development of mission and vision statements by the Board.
Surveys	4	Collect public input and ranges from targeting groups for a specific role, such as identifying potential partners, to gathering general information from wider stakeholder groups such as tourists to the region	• Journey Through Hallowed Ground hired a marketing firm to survey tourist preferences. • Freedom's Way surveyed the priorities of potential local and regional partners

Tactic	Number of Plans	Community Engagement Strategy	Select Examples
Email/Social Media Communications	4	Helps keep the public generally informed and may be used to solicit public comment	• Journey Through Hallowed Ground contacted all partners electronically to request their feedback on the final draft plan. • Sangre de Cristo used social media to provide regular updates and information on trail changes • Mississippi Hills sent email blasts to keep individuals and organizations in their network informed
Presentations	3	Leveraged to support community briefings and provide general status updates as well as conduct initial outreach	• Mississippi Delta used a presentation to introduce the public to the NHA
Community Forums	2	Gather input and support from community members and range in structure from briefings seeking input on high-level goals and objectives to full-day workshops with specific session topics.	• Mississippi Delta held an all-day forum with seven topics; participants were asked to discuss ideas, opportunities, and the role of the NHA in each area.
Site Visits	2	Collect information about the demographics and cultural heritage of NHA residents.	• Mississippi Delta conducted 25 visits to various sites including but not limited to: historic sites, centers, downtowns, neighborhoods, cultural centers, churches, restaurants, welcome centers, art galleries, museums, archaeological sites, parks, and scenic byways.

APPENDIX G – SUMMARY OF BRIGHT SPOT PARTNER ENTITIES

PARTNER ENTITIES	EXAMPLES	OUTCOME
Historical/ Tourism Boards	• In Sangre de Cristo and Ohio & Erie NHAs, historical boards maintain trail signs which highlight historic and tourism attractions. • Blue Ridge NHA partners with 26 volunteer Local Heritage Councils, one for each country and the Qualla Boundary within the NHA.	Partnerships with tourism and historical entities increase attendance, awareness, and historic preservation of the NHA and surrounding attractions.
Grassroots Organizations	• The Ohio & Erie NHA has several grassroots community organizations that review development issues within a 1-5 mile radius of Towpath Trail.	Partnerships with grassroots organizations increase awareness, and review/ provide perspective on the management plan.
National Park Service	• Yuma Crossing NHA and Freedom's Way NHA maintain close partnership with NPS units and NPS superintendents.	Leads to paperwork being processed faster and aids project implementation.
Universities	• Sangre de Cristo NHA recruits interns from Adams State University and provides them with research experience. • Mississippi Delta NHA is partnered with Mississippi Valley University.	Universities provide office space, important links to the local community, and academic/ research resources.
US Forest Service	• Sangre de Cristo NHA and the local USFS collaborate to maintain trails, communicate changes and update signs for trails in the NHA.	Collaboration on projects and development of management plan.
Municipal Partnerships	• Yuma Crossing NHA and the city of Yuma share staff, space, and co-manage historical sites.	City funds staff, freeing NHA resources for project work and grants.
Community Partnerships	• Mississippi Delta NHA partners with teachers throughout the state. The teachers visit the NHA, return home and work the NHA into their teachings. • Mississippi Hills NHA has volunteers that staff events or promote NHA at their workplace.	Community partnerships build interest and increase attendance in NHA events.
Tribal Nations	• Yuma Crossing NHA partners with the Quechan Nation on historical and ecological restoration projects. • Blue Ridge NHA reserves space for the Eastern Band of the Cherokee Nation to appoint a representative BOD.	Tell important stories that connect to the Tribes. Also builds trust and fosters long-term relationships between NHA's and Tribes.