

# Oil Region National Heritage Area *Evaluation Findings*



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# Executive Summary



## Purpose of the Report

The purpose of this report is to evaluate the accomplishments, investments, and sustainability of the Oil Region National Heritage Area (ORNHA) from its inception to the present (review period 2005 to 2016).

In 2004, United States Congress through Public Law 108-447 officially designated the ORNHA that encompasses 708 square miles in northwestern Pennsylvania. The National Heritage Area (NHA) includes all of Venango County and a portion of Crawford County, including Titusville and Oil Creek Township. An NHA can be any size and is intended to encourage historic preservation and an appreciation of the unique natural, cultural, historic, and scenic resources that represent a nationally important American story. The ORNHA is one of 49 designated areas. The focus of the heritage area is the discovery of oil and the first commercial well. In 1859, Drake Well became the first commercial oil well. With the discovery of oil, the area became known as “the valley that changed the world.” The emphasis is industrial, cultural, and natural heritage with an emphasis on the discovery of oil, architecture, trails, and the surrounding area.

The area’s coordinating entity, Oil Region Alliance of Business, Industry and Tourism (ORA) is headquartered in Oil City, Pennsylvania. ORA started receiving National Park Service (NPS) Heritage Partnership Program (HPP) funds in 2005. This evaluation covers the period from 2005 through 2015.

NHA designation is in perpetuity, although funding is limited and must be reauthorized or extended by Congress once the funding authority sunset date is reached or funding ceiling is reached. Based on the findings from the evaluation, the Secretary of the Interior will prepare a report to Congress with recommendations regarding the future role of NPS with respect to the NHA.

## Key Evaluation Questions

The key findings from the ORNHA evaluation are organized by the three questions introduced in Section 1 that serve as a framework for this evaluation:

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**Evaluation Question 1** Based on its authorizing legislation and general management plan, has the heritage area achieved its proposed accomplishments?

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

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**Evaluation Question 3** How do the heritage area’s management structure, partnership relationships, and current funding contribute to its sustainability?

## Key Findings

**Evaluation Question 1** Based on its authorizing legislation and general management plan, has the heritage area achieved its proposed accomplishments?

**The Evaluation determined that over the last 11 years, ORA has addressed each of its legislated purposes as outlined in the management action plan through the federal resources provided.** As outlined in Table E.1, the legislated purposes for the ORNHA and the management action plan articulated the plan goals into multiple strategy areas of activities. The Westat Evaluation Team and ORA administrators organized the activity areas into the three strategy areas represented in the Logic Model that guided this evaluation (see figure 3.1). ORA's efforts focus on three areas: Heritage Development, Economic Development, and Tourism Destination Marketing. Although a more complete assessment of the strategy areas are presented in Section 3, a brief description is introduced for the Executive Summary below.

**Heritage Development:** *Preserving cultural resources within the Oil Heritage Region; enhancing and preserving the region's recreational and natural resources; developing heritage resources and attractions; supporting and collaborating with municipalities, businesses, members, and partners in joint projects; and producing educational materials, documents, and events.*

**ORA has successfully fulfilled the legislative requirements in meeting Heritage Development Activity goals. From 2005 to 2015, ORA has invested \$6,879,852 in Heritage Development activities, or 35.3 percent of their investments.** Further, ORA had a substantial role in the planning and development of Heritage Development projects. Examples of Heritage Development activities include preserving the Neilltown Church, a property that now hosts multiple concerts. Further, ORA established and enhanced the Oil Creek Memorial Landing, which serves as a trailhead and a launching point

for canoes and kayaks. Respondents suggested that the preservation of the Tarbell House in Titusville has increased attendance at other area activities. Additional Heritage Development projects include the 150th year celebration of Oil (OIL150), a 17-month celebration from August 1, 2008 through December 31, 2009. Additionally, ORA tracks the number of visitors at main attractions within the ORNHA. **From 2009 to 2013, annual visitation ranged from 69,436 in 2010 to 239,122 in 2012.**

ORA also produces educational materials, documentaries, and events. For example, ORA has worked with partners to reprint books such as *Coal Oil Johnny – His Book*, *The Derrick Handbook of Petroleum*, *Oil City Victorian Houses*, *The Oil Well Driller*, and *Pithole – The Vanished City*. In addition to encouraging the books to be sold around the heritage area, ORA has supported converting the works to e-books.

Reports to NPS and data from respondent interviewees suggested that ORA met its goals of reusing and redeveloping ORNHA sites and collections; increasing protection of natural resources surrounding preserved sites; increasing preservation of historic petroleum/natural gas artifacts available for future generations; and increasing integration of subject matter expertise into ORNHA's and partners' programming. For example, many of the items from ORA's natural gas artifact collection have been transferred to the Drake Well Museum and been accessioned permanently by the Commonwealth of Pennsylvania. Other successes included restoring the Tarbell House and integrating the history of the Tarbell House and Tarbell family into local curricula. In terms of preservation of natural resources, ORA reports completing new trails such as 2 miles of new trails in both 2009 and 2013. These trails include the naturally preserved surroundings. ORA consciously strives to protect additional natural resources surrounding heritage sites, but interviewees and documents suggest that ORA could do more to satisfy this mission-driven goal.

**Economic Development:** *Promoting commercial and community development to support sustainable economic growth; coordinating development of local business expansions, new industry recruitment, brownfield reuse, workforce, and entrepreneurs; and hosting and assisting Oil City Main Street Program.*

**ORA has successfully fulfilled the legislative requirements in meeting Economic Development Activity goals. From 2005 to 2015, ORA has invested \$6,724,393 in Economic Development activities, or 34.5 percent of investments.** Further, ORA administration reported incorporating Economic Development throughout the other activity areas of Heritage Development and Tourism Destination Marketing. Economic Development activities included the recent “Get on the Trail Entrepreneurial Business Plan Contest,” which awards local businesses funds to carry out innovative ideas along the portion of the Erie to Pittsburgh Trail within the NHA. Other activities include developing industrial parks such as the **Sandycreek Industrial Park that retained 115 local jobs and created 30 new ones.** Additionally, ORA shares its office and works closely with the Oil City Main Street Program.

Data from reports and interviews with key informants suggest that ORA has met its goals of increasing the number of economic development projects and partners, increasing volunteers for ORNHA events, increasing ORA and partners’ strategic behavior in project planning, grant writing, collaboration, and fund development, and accelerating reuse of underutilized buildings and brownfield sites. For example, ORA partners with the local chambers of commerce, Venango College, and many local businesses to carry out economic development activities. Additionally, ORA created 15 new job opportunities in 2011 by coordinating financing (which was managed and assembled completely by Child Development Center, Inc.) of \$750,000 from First National Bank, Venango Industrial Development Authority, and a bond company to construct the Child Development Center in Oil City. In 2014, the same sources provided \$700,000 to expand the Child Development Center in Cranberry Township. **According to reports from**

**ORA to NPS, ORA had over 100 volunteers at key events in 2013 and 2014.** Key stakeholders discussed plans for brownfield redevelopment, and ORA will focus on this outcome more in the future. This suggestion echoes recommendations from the 2015 Sustainability Plan to remain focused on reusing brownfields.

**Tourism Destination Marketing:** *Conducting promotional activities including cooperative advertising, Northwest Pennsylvania Fishing Report, hospitality training, tourism publications, and assistance to Venango Regional Airport marketing; supporting events and activities that connect people to environmental/historic/cultural resources; and developing, printing, and distributing the Visitor Guide.*

**ORA has successfully fulfilled the legislative requirements in meeting Tourism Destination Marketing Activity goals. From 2005 to 2015, ORA has invested \$1,993,259 in Tourism Destination Marketing Activities, or 10.2 percent of investments.** Tourism destination marketing activities included producing a series of fishing reports together with the Pennsylvania Great Lakes Region, biking maps, and hiking-biking-water trails maps of the region. Additionally, ORA participated in the River Romp, Kennerdell Art and Music Festival, Oil Country Cruise, Oil Region Birding Festival, and “the Gusher,” (an ATV and motorcycle race by the Grand National Cross Country Series). The Visitor Guide and brochures are major activities for the ORA, and the Tourist Promotion Advisory Council distributes the guides widely throughout the ORNHA and beyond.

Data from key informants and reports from ORA suggest that ORA met its goals of increasing the number of attendees and sponsorships at the ORNHA activities/programs and widespread awareness of role and activities of the ORNHA and partners. For instance, “the Gusher” event brought nearly 3,000 visitors to the RiverStone Estate in Foxburg, according to the 2014 annual report. **Additionally, the Erie to Pittsburgh Trail User Survey and Economic Impact Analysis found that over 150,000 people used the bike trails and spent more than \$6 million annually.**

**Table E.1 ORA Goals and Activities**

Purposes as Specified in Legislation	Management Plan Goals	Current Goals/Activities
"Conserve, enhance, and interpret the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic"	Heritage Development Mission Goals  Economic Development Mission Goals  Tourism Destination Marketing Mission Goals	Heritage Development  Economic Development  Tourism Destination Marketing

According to intercept interviews, visitors to ORNHA sites seemed generally aware of the ad activities of ORA. Of the 42 intercept interviews, **74 percent were familiar with the ORA logo and 83 percent were familiar with the history of the region.** Many local interviewees reported learning about the historical significance of the region when they were in school. Additionally, there was overwhelming support to preserve the regional heritage of the ORNHA. ORA staff stressed that they will continue efforts to increase awareness across the area through logos on trails, heritage sites, and with signage on roads that cross through the ORNHA.

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

ORNHA has met its match requirements, with the NPS contribution being less than 50 percent of total expenditures for all years. ORA's financial statements indicate that between 2005 and 2015, \$9.37 million in NPS and matching financial resources were directed to related activities within the ORNHA. This demonstrates a record of finding alternative sources of revenue beyond what is required by the Congressional mandate (NPS Expended funds were \$2.6 million and match was \$6.5 million). Additional information can be found in Section 4 of the report.

ORA uses funding provided by the NPS to support operational expenses, including salary and administration funds, as well as programmatic activities. Since 2005, of the \$23.7 million total dollars available to ORA (which includes resources from the larger organization outside of Heritage Development but which are brought to bear for Heritage projects), 12 percent or \$2.8 million were direct from NPS federally allocated Heritage Partnership Program funds and 26 percent or \$6.5 million, were non-Federal funds and external matching contributions. Operational expenses include employee related expenses, administrative expenses, outside services, insurance, project management and construction, repair and maintenance, utilities, salaries, rent, and general marketing. Programmatic expenses are those resources dedicated to ORNHA activities, such as heritage development (35.25%), economic development (34.45%), tourism destination and marketing (10.21%), and property management (20.09%).

The evaluation assessed the investments made by ORA and found that they generally aligned with the core mission and goals. Expenditures were in keeping with the core areas of heritage development, economic development, tourism destination marketing, and property management throughout this period.

As pointed out in Section 4, the financial records for federal funding that ORA provided to NPS could not be independently verified with official documents. While ORA was able to provide specific financial figures as required for the evaluation, neither the official tax documents nor other official audits distinguish NPS (or other Federal agency) funding in a way that allows ORA's figures to be verified systematically, consistent with the evaluation guide. If NPS funds were not available to support ORA, activities within the ORNHA would likely continue, albeit at a much reduced scale. Activities that are mostly funded through non-NPS funding (i.e., many economic development and tourism destination marketing activities) would likely continue, but heritage development activities would be limited.

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**Evaluation Question 3** How do the heritage area's management structure, partnership relationships, and current funding contribute to its sustainability?

To guide the assessment of sustainability, we have adopted the definition developed by NPS with the assistance of stakeholders from a number of National Heritage Areas. Sustainability for an NHA is as follows:

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

**In terms of sustainability, the evaluation found that ORA has demonstrated a capacity for overseeing operations as an indicator of sustainability not only through strong leadership, but also through its modes of monitoring visitors and long history with key partners.** As discussed in Section 2, the ORNHA is governed by the ORA. The Board of Directors is composed of a maximum of 19 members: up to 13 elected directors and up to six appointed by the Board. Stakeholder interviews suggested that elections to the board strive to maintain representation across geography, activity area, and experience. Board members stated that sustainability is a primary focus of ORA activities. The ORA proactively conducted a sustainability plan that lays out a number of concrete steps to detail how ORA should support partners in the future. Highlights of the sustainability plan (completed in December 2015) suggest that **ORA's future paths for sustainability include educational travel and VolunTourism, outdoor recreational travel and tourism, entrepreneurial initiatives, and brownfield and community redevelopment initiative.**

Almost unanimously, **stakeholders suggested that heritage development activities would be sharply diminished if NPS funding disappeared.** Responses to questions about sunsetting of NPS funding varied from "crippling" to "limited change," with most respondents believing the absence of NPS funds would be a substantial challenge to activities within the ORNHA. Additionally, interviewees stated that eliminating NPS funds would minimize the amount of flexible funds that ORA uses currently to leverage other funds. In addition, stakeholders suggested that the reputation that comes from NHA designation is vital to sustainability. With continued support from NPS and a clear plan for sustainability, the board and additional leadership are poised to continue successfully working toward meeting the stated goals of the NHA.

## Structure of the Report

### The report is divided into 5 sections

**Section 1** defines and describes the National Heritage Areas (NHA) and NHA coordinating entities in general and describes the evaluation methodology. It also introduces the Oil Region National Heritage Area (ORNHA), which is the focus of this evaluation report.

**Section 2** provides an overview of the ORNHA; the coordinating entity structure and organization; the ORNHA authorizing legislation, mission and goals; and relationships between community and NPS partners.

**Section 3** explores the first evaluation question, “Based on its authorizing legislation and general management plan, has the heritage area achieved its proposed accomplishments?” It describes the ORNHA coordinating entity’s goals and objectives as required by the authorizing legislation and management plan; the relationship of these goals to program areas and activities; and the ORNHA coordinating entity’s relationship with various NPS organizations.

**Section 4** explores the second evaluation question, “What have been the impacts of investments made by Federal, State, Tribal and local government and private entities?” It provides an overview of the investments made in the ORNHA coordinating entity and an analysis of how the ORNHA coordinating entity has used the investments, and their impact.

**Section 5** explores the third evaluation question, derived from legislation (P.L. 110-229), “How do the coordinating entity’s management structure, partnership relationships, and current funding contribute to the ORNHA’s sustainability?” This section presents an analysis of the interrelationship of the coordinating entity’s staffing and ability to obtain resources and the sustainability of the ORNHA.

# Section 1 – Introduction

## 1.1 National Heritage Areas

A National Heritage Area (NHA) is a designation given by the United States Congress to an area that has places and landscapes that collectively represent a unique, nationally important American story. An NHA can be any size and is intended to encourage conservation and an appreciation of the natural, cultural, historic, and scenic resources that have been shaped by the area’s geography and history of human activity.

A coordinating entity or management entity is typically the organization within the NHA boundary that is tasked with bringing together diverse interests, goals and activities, resources, and efforts to define and work collectively toward the common goals of the NHA. The coordinating entity is charged with the responsibility for developing and implementing a management plan that will achieve the goals specified in the heritage area’s enabling legislation. It also manages the Federal and additional funding obtained by the heritage area. The coordinating entity may be a Federal commission, state agency, local university, local government, or nonprofit organization. The coordinating entity usually creates an Advisory Board and/or working groups whose members provide a balanced representation of diverse interests, disciplines, backgrounds, and ethnicities to plan and implement actions that meet the requirements of the heritage area legislation and plans. Members of the Boards or working groups may include elected officials, nonprofit practitioners, business representatives, librarians, historians, naturalists, landscape architects, educators, and civic organization leaders.

## 1.2 Report Purpose

“...National Heritage Areas are places where natural, cultural, historic, and scenic resources combine to form a cohesive, nationally important landscape arising from patterns of human activity shaped by geography.<sup>1</sup>”

Since President Reagan signed the law establishing the first NHA on August 24, 1984, Congress has officially authorized 49 NHAs, each with federal funds provided over a subsequent amount of years as specified in the authorizing legislation. Oversight of this program was assigned to the National Park Service (NPS). The purpose of this report is to present evaluation findings that document accomplishments within the Oil Region National Heritage Area (ORNHA) Partnership since the NHA’s designation, and to establish whether it has succeeded in meeting the goals established by the authorizing legislation.

### This evaluation follows four previous major NHA evaluation projects:

#### 2008 - Development of a National Heritage Area Evaluation Strategy: Report on Phase 1 (NPS Conservation Study Institute)

Based on The Conservation Study Institute’s (CSI’s) experience conducting evaluations of three Heritage Areas

- John H. Chaffee Blackstone River Valley National Heritage Corridor, 2005
- Delaware and Lehigh National Heritage Corridor, 2006
- Cane River National Heritage Area, 2008

Incorporated substantial input from the Alliance of National Heritage Areas (ANHA) Peer-to-Peer Committee

Provides a comprehensive overview of the core ingredients, guiding strategies, implementation activities, and accomplishments of a generic heritage area

<sup>1</sup> National Park System Advisory Board. “Charting a Future for National Heritage Areas.” Available online at <https://www.nps.gov/resources/upload/NHAreport.pdf>

### 2009 – First Congressionally-Mandated Evaluations (CPM/Westat)

The Center for Park Management (CPM) conducted an evaluation of the Essex National Heritage Commission that:

- Built on the structure and content of the program models developed by CSI;
- Differed from the CSI evaluations in its objectives and focus in that it focused on the processes that heritage areas make use of in order to accomplish their goals and the role and benefits of partnership and collaboration; and
- Focused on outcomes as they related to the authorizing legislation and general management plan, the impact of financial investments, and the role of partnerships in the sustainability of Essex National Heritage Area.

CPM/Westat evaluations of Augusta Canal NHA and Silos and Smokestacks NHA build on CPM's evaluation of the Essex National Heritage Commission.

- Differs from the first CPM evaluation in that it focuses on developing a replicable model of evaluation that can be conducted by a consultant working for NPS.
- Model is based on triangulated qualitative data collection through topic-centered interviews and document review. It does not include large-scale surveys due to cost and OMB Paperwork Reduction Requirement issues.

### 2012 – Six Congressionally-Mandated Evaluations (Westat)

- Tennessee Civil War National Heritage Area; South Carolina National Heritage Corridor; Hudson River Valley National Heritage Area; National Coal Heritage Area; Ohio and Erie Canal National Heritage Corridor; Rivers of Steel National Heritage Area.
- Followed model used for Augusta Canal National Heritage Area and Silos and Smokestacks National Heritage Area.
- Based on the findings from each evaluation, the Secretary of the Interior prepared a report to Congress with recommendations regarding the future role of NPS with respect to each NHA.

### 2015 – Four Congressionally-mandated evaluations (Westat)

Four evaluations were completed in 2015: Lackawanna Valley National Heritage Area, Last Green Valley National Heritage Corridor, Yuma Crossing National Heritage Area, and MotorCities National Heritage Area. These were based on the model used for the 2012 evaluations and were referenced in Public Law 113-291 which states: (B) Evaluation.—An evaluation conducted under subparagraph (A)(i) shall –

- (i) assess the progress of the local management entity with respect to—
  - (I) accomplishing the purposes of the authorizing legislation for the national heritage area; and
  - (II) achieving the goals and objectives of the approved management plan for the national heritage area;
- (ii) analyze the investments of Federal, State, tribal, and local government and private entities in each national heritage area to determine the impact of the investments; and
- (iii) review the management structure, partnership relationships, and funding of the national heritage area for purposes of identifying the critical components for sustainability of the national heritage area.<sup>2</sup>

The legislation goes on to state that authorization shall be to 2020 if an evaluation is not performed, and to 2021 if an evaluation under the auspices of the US Department of the Interior is performed.

<sup>2</sup> <http://www.gpo.gov/fdsys/pkg/PLAW-113publ291/html/PLAW-113publ291.htm>

### 2016 – Three additional evaluations (Westat)

Since the initial congressionally-mandated evaluations were conducted, NPS has adopted a policy to evaluate all NHAs, preferably 3 years prior to their sunset date and using the model outlined in the National Heritage Area Evaluation Guide. There are currently three 2016 evaluations underway on the following heritage areas/corridors: National Aviation Heritage Area, Oil Region National Heritage Area, and Schuylkill River National Heritage Area.

### 1.3 Oil Region National Heritage Area

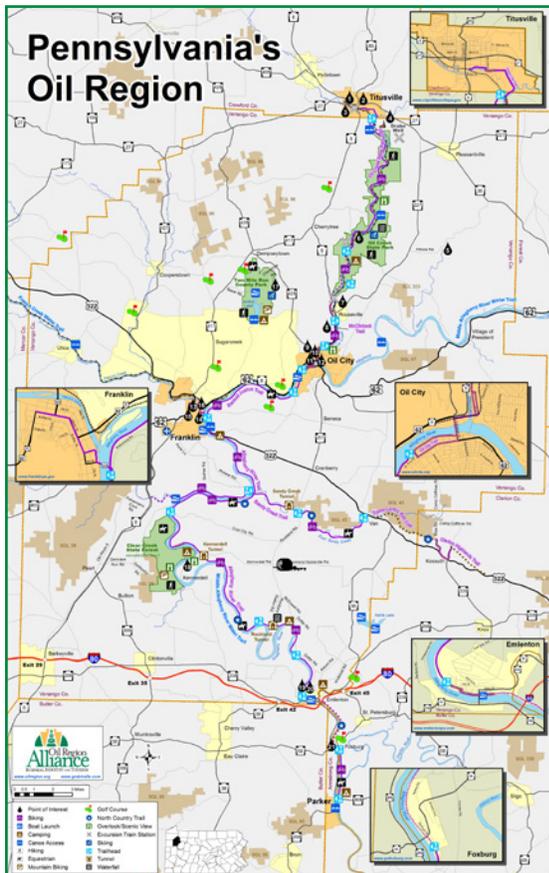
The ORNHA includes all of Venango County and a portion of Crawford County, including Titusville and Oil Creek Township with approximately 62,199 residents according to the 2014 estimated Census. The regional boundary encompasses 708 square miles. Figure 1.1 is a map of the ORNHA (see appendix 9 for a full size map). The focus of the heritage area is the discovery of oil in 1859 at Drake Well. With the discovery of oil in the region the area became known as the “the valley that changed the world.” The focus of the heritage area is industrial, cultural, and natural heritage with an emphasis on the discovery of oil, architecture, trails, and the surrounding area.

**Table 1.1 Overview of Oil Region Heritage Area**

Overview Area	NHA Description
Designated	2004 by Public Law 108–447
Location	Northwestern Pennsylvania
Encompasses	Venango County and the City of Titusville and Oil Creek Township in Crawford County, Pennsylvania
National Historic Themes	Petroleum industry, Natural gas industry, Architecture
Organizational Structure	Oil Region Alliance of Business, Industry and Tourism
National Park Partners	National Park Service (Northeast Region)

Overview Area	NHA Description
Other Partners	<ul style="list-style-type: none"> <li>• US Department of Labor</li> <li>• State of PA (e.g., Department of Conservation and Natural Resources, PennDOT, Department of Community and Economic Development, legislature, Governor)</li> <li>• County governments</li> <li>• Municipal governments</li> <li>• Not-for-profit organizations</li> <li>• Industry (e.g., Walmart, Petroleum History Institute, National Fuel Gas)</li> <li>• Crawford County Convention and Visitors Bureau</li> <li>• Universities</li> <li>• ORNHA members</li> <li>• Subject matter experts (speakers and researchers)</li> <li>• Volunteers</li> <li>• Interns</li> <li>• Friends of Tarbell House</li> <li>• Artists</li> <li>• Historians</li> <li>• Private foundations and trusts</li> <li>• Oil City Main Street Program</li> <li>• Erie to Pittsburgh Trail Alliance</li> <li>• Council on Greenways and Trails</li> </ul>

Figure 1.1 ORNHA Map



## 1.4 Evaluation Methodology

### 1.4.1 Methodology

The methodology, presented in the National Heritage Area Evaluation Guide, July 2015, is designed to maximize both the use of existing data and the ability to measure specific outcomes of Oil Region Alliance of Business, Industry and Tourism (hereafter ORA) activities (see figure in Section 1.4.3 below). The period covered by the evaluation starts with the 2004 designation as the ORNHA through 2016, 11 years during which ORA received Federal funding (2005–2016).

Data from interviews and on-site visits to the ORNHA and its partnership organizations were collected in spring, 2016; completed financial audits were available and reviewed through 2015. The current financial position of ORA and plans for addressing the future were documented in interviews with Leadership and Board Members. This information, including conclusions concerning sustainability, is presented in this report.

The following three questions—derived from the congressional mandate—guided the evaluation:

1. Based on its authorizing legislation and general management plan, has the coordinating entity achieved its proposed accomplishments for the NHA?
2. What have been the impacts of investments made by Federal, State, Tribal and local government and private entities in the NHA?
3. How do the coordinating entity’s management structure, partnership relationships and current funding contribute to the NHA’s sustainability?

The evaluation used a case study design to address these evaluation questions. This design allowed for the examination of multiple variables of interest and multiple sources of data. The evaluation also incorporated a collaborative approach with project stakeholders to ensure that the findings are grounded in the local knowledge of the site. The tailored data collection tools and this report reflect the comments provided by the NPS, and the ORNHA evaluation site. The following sections describe each phase of the evaluation.

### 1.4.2 Site Introduction and Background Research

During the initial phases of the evaluation process, Westat contacted ORA staff to discuss preliminary planning details and initial background research requests. Over the course of an onsite face-to-face meeting (Meet & Greet Visit), multiple email exchanges, and several telephone conversations during November and December 2015, Westat introduced the evaluation team and evaluation methodology to ORA staff.

During the Meet & Greet Visit on December 7 -8, 2015, Westat project staff worked with ORA staff to develop a logic model for ORA’s review. Figure 3-1 is the final logic model that guided the development of the data collection protocols. Also, at this time, roles and responsibilities for all parties involved in this evaluation were discussed. The evaluation team provided ORA an evaluation methodology (Appendix 2) and data collection protocols (Appendix 3).

### 1.4.3 Data Collection

Figure 1.2 Data Collection Process



Data collection methods included reviews of documents and financial audits, in-person and telephone interviews with key informants from ORA, partner and stakeholder organizations, and community intercept interviews with individuals visiting the NHA. A protocol guided the data collection, outlining the domains and measures of interest to collect from each identified source (i.e., prospective interviewees, program documents, financial documents, legislation). During data collection, evaluation staff used topic-centered guides for conducting interviews and abstracting documents. Data collection began in November 2015 and was completed by April 2016.

Numerous documents were reviewed to understand the background of the ORNHA and ORA (e.g., legislative documents, plans, by-laws); its staffing and structure (e.g., organizational charts); funding received and expenditures (e.g., yearly audit reports); and strategies and activities conducted (e.g., annual

reports, management plans, concept plans). These documents also provided information on the outcomes that have occurred from ORA activities.

Individual interviews were conducted with 26 ORA staff and partners. These interviews helped the evaluators gain an understanding of the background and history of NHA, the coordinating entity's activities and investments and their associated outcomes, and the coordinating entity's contribution to NHA's sustainability.

Interviews were conducted with representatives from many stakeholder and partner organizations. These interviews discussed the genesis of the organization's relationship with ORA; the influence and impact that the stakeholder perceives that ORA has made in the community; and additional ways the interviewee believes activities within the ORNHA could serve the needs of the region. Stakeholder interviewees were selected by Westat from a list of organizations with which ORA has relationships and that have a vested interest in the work of ORA. We also utilized snowball sampling to select additional interviewees based on suggestions and comments from the partners we interviewed. Stakeholders were selected to be representative of the three ORA strategy and activity areas specified in the Logic Model: Heritage Development, Economic Development, and Tourism Destination Marketing.

Forty-two community intercept interviews were conducted with members of the public to learn how familiar they were with the history and culture of the NHA and the ways in which they gained this knowledge and familiarity, whether they had visited the ORNHA and used its resources, and their views on the impact the activities sponsored by ORA has had on the community (i.e., economic, cultural, historic, restorative). We visited several key locations including Franklin Trailhead, Drake Well Museum and Park, Jersey Bridge Trailhead, Petroleum Center, Dawndi's Restaurant, and Quality Inn Hotel in Franklin. These locations were sampled to provide a range within the ORNHA.

See Appendix 3 for the management interview protocol, partner interview protocol, stakeholder interview protocol, and community intercept interview protocol.

#### **1.4.4 Data Analysis**

The focus of the data analysis was to document the extent to which ORA had achieved its organizational and programmatic goals as articulated in the mandating legislation and the ORNHA and ORA foundational documents. Findings discussed have been triangulated; that is, information has been documented and analyzed on key areas from multiple sources. In addition, efforts have been made to ensure that the information gathered from key informants also has been substantiated with data from documents and other written sources.

#### **1.4.5 Evaluation Limitations**

To the greatest extent possible, we have tried to ensure this evaluation methodology thoroughly addresses the three research questions. However, we recognize that there are parameters to this methodology that result in a few limitations on evaluation findings. In some instances, there is a trade-off between maximizing time and efficiency with comprehensiveness and level of precision in findings. For instance, to obtain input from community stakeholders, a survey is not possible within the current evaluation due to OMB Paperwork Reduction Requirements. Therefore, the data received from intercept conversations provide a more qualitative assessment of the community's perceptions of the ORNHA. As noted, limitations to the community input include convenient, rather than representative, samples of tourists, local residents, and volunteers, and perceptions rather than hard evidence on the impact of the activities within the ORNHA on stakeholder knowledge, attitudes, and involvement with ORA.

Additional limitations relate to our ability to provide definitive evidence of ORA's achievement of outcomes based on the evaluation design, especially attributions to the NPS funding and NHA designation. Any changes in data over time can also be influenced

by confounding variables, such as overall local and regional trends in spending or shifts in community activities by other organizations. Without a closely matched control site with very similar characteristics (another limitation), any conclusions drawn from trends in one location have to be taken with caution. Furthermore, although it is likely that the NPS funding has helped to leverage other funding, the extent to which ORA may have been successful in receiving some of this funding without the HPP resources and NHA designation is unclear. It is hard to infer what would have happened without the funding of the ORNHA, but it is clear there have been many accomplishments. We have designed this study to triangulate findings from a variety of sources and use a logic model to provide structure in organizing goals, activities, and outcomes.

## 1.5 Roles

### 1.5.1 Westat (External Evaluator)

Westat served as the external evaluator, tailoring the methodology we used in earlier evaluations to the specifics of the Oil Region site. As in prior evaluations, we prepared and revised a logic model to guide the evaluation in collaboration with ORA staff, prepared the data collection protocols, collected and analyzed the data, and prepared this document.

### 1.5.2 National Park Service (NPS)

NPS provided advice and resources for the evaluation team and oversight of the entire evaluation process. The NPS Representatives included the NPS National Coordinator for Heritage Areas and the NPS Assistant National Coordinator for Heritage Areas. In addition, the Evaluation Team members met with the NPS Regional NHA Coordinator for the Northeast Region.

### 1.5.3 Oil Region National Heritage Area

The staff of ORA (the President and CEO, the executive vice president, the vice president for heritage development, the vice president of economic development,) played key roles in facilitating this evaluation. They provided data and documents, helped as needed with scheduling and planning site visits, identified a pool of contacts for interviews, provided feedback on the evaluation process, and participated in interviews. ORA collaborated with the evaluation team to develop the logic model. ORA was not involved in the development of the methodology or data collection protocols though they were provided an opportunity to comment. ORA staff and Board had the opportunity to review this document for factual accuracy after the draft was completed by Westat in May, 2016.

#### Westat (External Evaluator)

- Revised methodology
- Prepared and finalized logic model
- Prepared data collection protocols
- Collected and analyzed the data
- Prepared this findings documents

#### National Park Service (NPS)

- Served as evaluation sponsor
- Provided advice, resource, oversight for the evaluation

#### Oil Region Alliance (ORA)

- Facilitated the evaluation
- Provided data documents
- Assisted in scheduling and planning
- Participated in interviews

## Section 2– Overview of the NHA

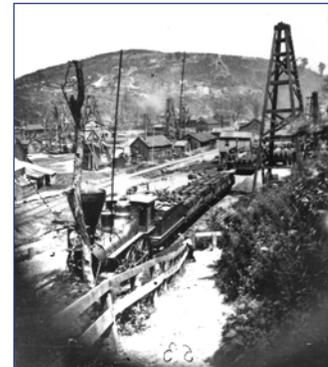
This section of the evaluation report begins with an overview of the physical and operational aspects of the Oil Region National Heritage Area (ORNHA) and the roles and responsibilities of the coordinating entity, the Oil Region Alliance (ORA). This is followed by descriptions of the types and significance of relationships that exist between and among ORA staff, stakeholder/partners organizations, and the National Park Service (NPS) in Section 2.2. Finally, Sections 2.3 and 2.4 present a timeline of key events and key evaluation findings, including investments and their long-term impacts.

### 2.1 Introduction to ORNHA & ORA

The Oil Region has played a unique and important role in American history and the development of the United States as the world's first commercial oil well. The surrounding area's landscapes have unique natural and man-made resources that are intertwined with the history of the oil industry and the heritage of boom and bust, spoils and recovery. The remnants of the oil industry are seen across the region with abandoned boomtown settlements, oil farms, and industrial landscapes. The community within the Oil Region has the desire to tell the story of the region and celebrated the discovery of the first commercial oil well 150 years ago with celebrations to increase the national public knowledge and understanding of the significance of the early oil and natural gas industry developments in northwestern Pennsylvania.

The following are a few highlights from the ORNHA region's history:

- 1859:** Colonel Edwin Drake drilled the world's first commercial oil well.
- 1871:** Titusville Oil Exchange formed.
- 1872:** Newton Gas Well, Titusville, produced gas for 250 customers.
- 1873:** Edwin L. Drake granted a \$1500 annual pension by Commonwealth of Pennsylvania.
- 1874:** Bradford oil field boom.
- 1880:** November 8—Edwin Drake died in Bethlehem, PA, at age 61.
- 1881:** Standard Oil organized the National Transit Company.
- 1882:** Standard Oil Trust organized.
- 1892:** First steel derrick, 72 feet in height, constructed and made available through catalog.
- 1892:** Standard Oil Trust passed formal resolution to dissolve.
- 1899:** Standard Oil reorganized as holding company in NJ.
- 1902:** Ida Tarbell began publishing Standard Oil series in McClure's Magazine.
- 1904:** First plant for extracting natural gasoline (Casinghead gasoline) from natural gas by the compression method built by Andrew Fasnemeyer near Drake Well at Titusville, PA.
- 1909:** Standard Oil of NJ found guilty of Sherman Act violations, company dissolved into 37 independent organizations in 1911.
- 1919:** Gasoline replaced kerosene as product leader of the American petroleum industry
- 1889:** Feasibility study for "Oil Region Heritage Park."
- 1993:** "Oil Region Heritage Park Management Action Plan Inventory Report" published.
- 1994:** Governor Robert P. Casey designated PA Oil Heritage Park including Venango County and eastern Crawford County, approving the "Management Action Plan for the Oil Region Heritage Park."
- 1996:** OHP Steering Committee becomes Board of Directors when Oil Heritage Region, Inc. is incorporated as nonprofit entity classified by the IRS as 501(c)(3) tax-exempt corporation.



*Locomotive barrels*

**1998:** “Oil Heritage Region; Interpretive Prospectus” approved.

**2001:** “Oil Heritage Region Strategic Marketing Plan” approved, including regional marketing symbol for use by multiple partners.

**2004:** Letter of Intent to merge Venango Economic Development Agency, Oil City Community Development Corporation, Oil Heritage Region Tourist Promotion Agency, and Oil Heritage Region, Inc.; followed by signed Corporate Resolutions to merge, forming ORA.

**2004:** Federal Public Law 108-447 is passed by Congress on November 20, 2004, designating the ORNHA and its administrative entity, with same boundaries as used for PA Oil Heritage Region. President George W. Bush signs HR 4818. Earlier in the year, updated the OHR Management Action Plan.

**2005:** Merger forming Oil Region Alliance of Business, Industry and Tourism takes effect January 13, 2005. Federal NPS funding to ORA for ORNHA begins. Executive Directors of the merged entities become Vice Presidents, and new President is recruited from Texas.

**2006:** “Oil Heritage Region Management Plan Augmentation 2006” adds sections related to federal designation and responsibilities.

**2006–2010:** ORA administers OIL 150 nationwide, including events, celebration, educational posters and materials, museum kits, specialty products, documentaries, new website, and additional temporary staff. Official celebration period was August 1, 2008–December 31, 2009, especially August 27, 2009.

**2008:** Secretary of the U. S. Department of the Interior signs the Oil Region National Heritage Area’s Management Action Plan Augmentation.

**2010:** “Oil Region Alliance Strategic Business Plan for 2010-2015” adopted. ORA staff completes move from rented space in the National Transit Building in Oil City into ORA-owned property also in Oil City.

**2011:** ORA corporate logo revised and then used throughout system.

**2012:** ORA personnel compliment is significantly down-sized following change of leadership.

**2013:** ORA adopts Asset-Based Economic Development philosophy.

**2014:** ORA Board of Directors downsizes and revises Bylaws accordingly.

**2015:** “Oil Region Alliance 2014 Annual Report and 10-Year Review” published. “ORNHA Sustainability Plan” prepared. Westat begins an Independent evaluation of ORNHA as per NPS National Heritage Area (NHA) evaluation guidelines.

The timeline from 1859 to the present day represents the history of the petroleum and natural gas history and architecture. In 1859, the first successful oil well became operational; since then it has been influential throughout the world in industry, nature, social and political structures. The story of the “valley that changed the world” is carried out through the following activities:

- Heritage development;
- Economic development; and
- Tourism destination marketing.

**Authorizing Legislation:**

- Public Law 108-447

**ORNHA Original Mission:**

“to assist the Commonwealth of Pennsylvania, its units of local government, and area citizens in conserving, enhancing, and interpreting the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic development for the benefit and inspiration of present and future generations”

**ORNHA Objectives:**

- Define regional identity
- Create regional linkages
- Tell the ORNHA story by building on existing interpretive resources
- Strengthen regional tourism
- Revitalize and interpret the cultural landscape of the region
- Create a mechanism and forum that can be a catalyst for regional action

In 1994, Pennsylvania Governor Robert P. Casey established the Pennsylvania Oil Heritage Park. The Oil Heritage Park is one of 12 state heritage areas in Pennsylvania. The state area heritage area was created to share the region’s distinct history related to oil as a central theme to attract tourist, businesses, residents, and investments. The designation of the state heritage area helped the region expand trails, improve venue, preserve historic projects, and expand the management capability.

## **2.2 Introduction to ORA**

Congress acknowledged the national importance of the resources and heritage of the region, and on November 20, 2004, President George W. Bush signed Public Law 108-477, designating the Oil Region as a National Heritage Area. On January 13, 2005, a merger of the Venango Economic Development Corporation, Oil City Community Development Corporation, Oil Heritage Region, Inc., and Oil Heritage Region Tourism Promotion Agency formed the Oil Region Alliance of Business, Industry, and Tourism (ORA). ORA is the administrator of the ORNHA mission and development. ORA is a non-profit 501(c)3 corporation with a board of directors. The bylaws of the corporation provide unlimited membership to ORA and up to 19 members on the board of directors.

### **2.2.1 Authorizing Legislation and NHA Vision and Mission**

The inception of ORA in 2005 created one voice for the communities, organizations, and places it represents in northwestern Pennsylvania’s Oil Region. Businesses, industry, and tourism were united under a single umbrella to give the region a stronger voice. ORA has since been designated with several roles: by the PA Department and Community and Economic Development (DCED) and Venango County Commissioners as the lead economic development agency for Venango County; by The Venango County Commissioners and PA DCED as the official tourist promotion agency for the county; by Pennsylvania’s governor and DCNR designated as the administrator of the Pennsylvania Oil Heritage Region; and by NPS and Congress as the administrator of the ORNHA.

The Management Action Plan set forth by ORA in 2006 was intended to further the purposes of the NHA by providing both a vision for the future and a blueprint for public and private agencies. According to the 2015 Sustainability Plan, the plan was divided into three sections: short-term (2004–2007), mid-term (2008–2011) and long-term (2012 and beyond). The short-term plan involved support for building a regional and operational identity; strengthening program management capacity; extending and amplifying recreational assets; reinforcing the region’s heritage venues; and laying the groundwork for new venues and ventures. The mid-term plan included expanding the recognition, brand identity, and management capacity; reinforcing the core community center; expanding the regional trail systems connections and amenities and new recreational facilities; packaging recreation and heritage experience; updating and improving the interpretation in the region; and developing additional revenue sources. The long-term goals for 2012 and beyond include expanding the activities offered for the broader community benefit, developing long-term ORA ventures that have potential for revenue, and working towards ORA sustainability.

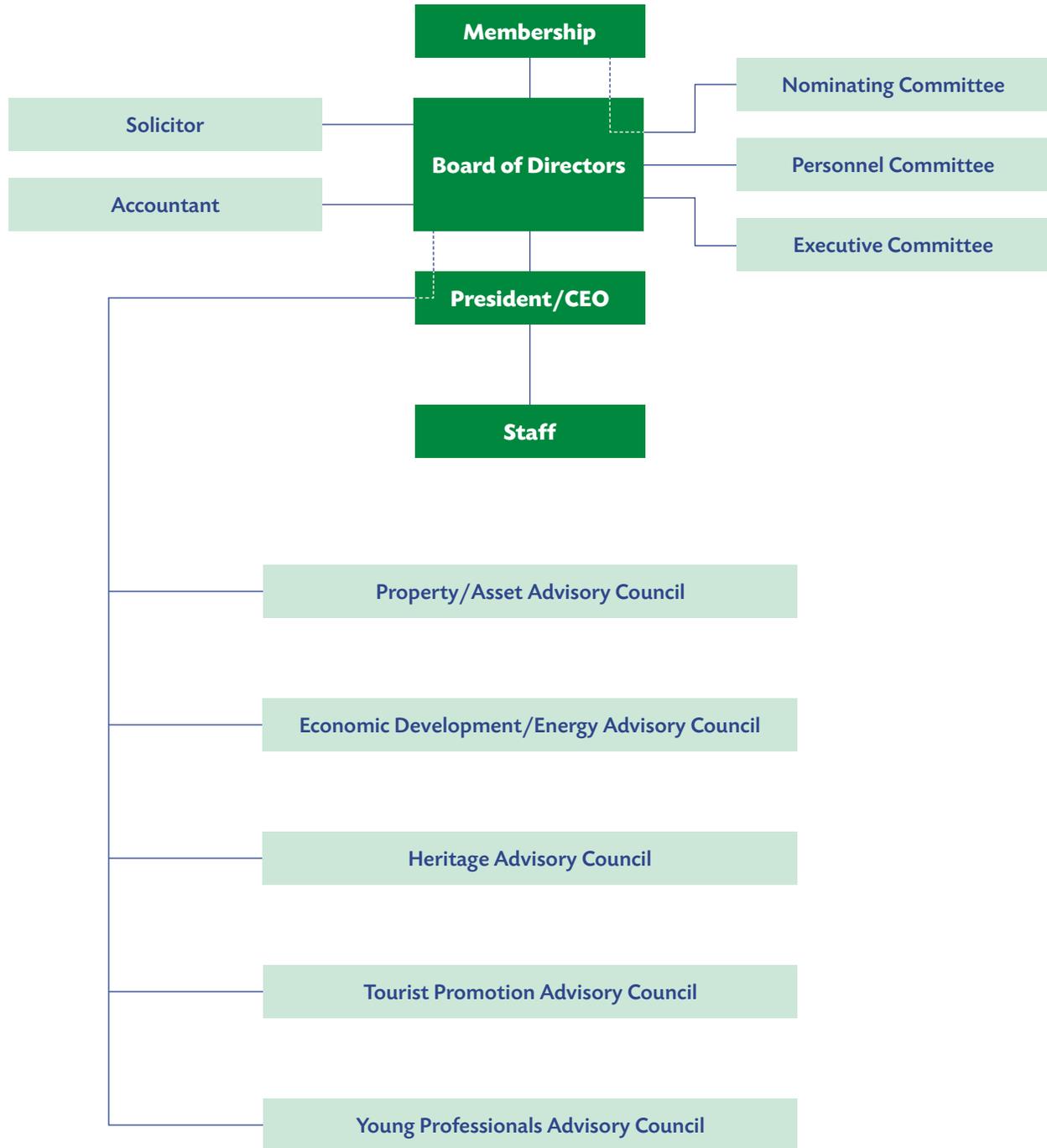
### **2.2.2 ORA’s Organizational Structure**

ORA operates as the NHA’s coordinating entity and has general oversight over NHA management and program staffing. As described in Sections 3 and 5, the activities carried out in the ORA (i.e., Heritage Development, Economic Development, Tourism Destination Marketing) are overlapping more over the years. In 2005, the activity areas were distinct, while they are much more integrated in 2015. The management entity is a 501(c)3 non-profit corporation led by a Board of Directors with 13-19 members. The 2015 board includes representation from industry, banking, business, local museum and educational institutions, authors, chambers of commerce, utilities and local government. ORA’s bylaws state that the purposes/mission of the organization “shall be the preservation, promotion, development and support of historical, educational, natural, recreational, residential, commercial and industrial assets in Venango County, Pennsylvania

and the surrounding area (the ‘Oil Region’).” As of December, 2015 ORA was composed of a staff of nine people: a President/Chief Executive Officer, an Executive Vice President, two Vice Presidents

(Heritage Development and Economic Development), three Project Managers, an Office Manager, and the Oil City Main Street Manager.

**Figure 2.1 Organizational Chart of ORA**



## 2.3 ORA & ORNHA's Relationships with Partners/Stakeholders and NPS

The discovery of Oil has shaped the economic growth of western Pennsylvania over the past 150 years when oil was first discovered. Beginning in 2004 NPS became involved and the Oil Region National Heritage Area was formed. ORA's involvement with NPS originated from long-term efforts between the Oil Heritage Region, Inc., and national legislators such as John Peterson, former congressperson from Titusville. The ORNHA is under the umbrella of ORA which together has been instrumental in forming partnerships among city, county, regional, state, Federal agencies and private entities. More detail on partner and stakeholder activities are described in Section 3.

### 2.3.1 Partners and Stakeholder Organizations Relationships

A critical component of ORA's mission is to execute a coordinated effort that involves the partnership with different Federal, local, state, public and private organizations in the heritage region. Several of the general operations and management mission goals outlined in the Oil Heritage Region Management Action Plan focus on partnerships and collaboration and span across the three strategy/activity areas. They are as follows:

- Build a consolidated identity.
- Develop products to support ORA and provide ongoing revenue.
- Pursue unique projects that are of interest to more than one agency.
- Undertake longer-term technical assistance programs that are multi-purpose.
- Develop new revenue sources to support ORA and its heritage efforts.
- Undertake event sponsorships and participate in events outside the region.
- Expand partnerships with other collaborating entities to take advantage of the larger capabilities of ORA.

In addition to communication and cooperation among public and private agencies, ORA has undertaken extensive outreach to include and listen

to the key stakeholders. For the descriptions of their involvement, see Appendix 6.

A sizeable number of partners provided funding for a variety of projects.

#### Federal

- National Park Service
- US Department of Labor
- US Department of Agriculture
- US Department of Transportation
- Small Business Administration
- US Department of Health and Human Services

#### State

- PA: Department of Conservation and Natural Resources
- Pennsylvania Historical & Museum Commission
- PennDOT
- Pennsylvania Council on the Arts
- Department of Environmental Protection
- Department of Community and Economic Development
- Redevelopment Assistance Capital Program

#### Local

- Forest and Venango County CDBG
- Appalachian Regional Commission

#### Private and Foundation

- Petroleum History Institute
- Multiple charitable trusts
- American Association of Petroleum Geologists Foundation

In addition, the ORNHA has fostered strong relationships with a large list of partnering organizations throughout the state and region.

#### Partners/Stakeholders

- Preservation Pennsylvania
- PA Great Lakes Region
- Penn Soil Resource & Conservation Development Council

## Business and Corporate Partners

- Joy Global/Joy Mining
- Kapp Alloy & Wire Company
- National Fuel Gas Corporation
- PNC Bank
- Specialty Fabrication and Powder Coating

### 2.3.2 NHA Partnership with NPS

NPS provides funding and technical assistance to ORA, as well as administrative assistance such as guidance with paperwork for new practices. The Northeast Regional Office of the NPS requires that ORA submit quarterly financial reports (SF425s) and performance reports as per the requirements of their cooperative agreement. The NPS NHA coordinator acts as the Agreement Technical Representative and provides assistance to the heritage area in the development of their annual work plan and budget and ensures that their annual allocation is awarded. The regional office conducts site visits as needed, but is otherwise not directly involved in ORA daily activities. Regional NPS office staff attended our meet-and-greet site visit,

and the staff of ORA suggested that they appreciated the ongoing and continuous partnership with NPS. Although NPS does not actively oversee day-to-day activities, ORA staff reported a close working relationship with the regional NPS office and a growing relationship with the NPS Superintendent for National Parks in western Pennsylvania.

### 2.4 NHA Timeline

Very soon after receiving the Federal NHA designation in 2004, Venango Economic Development Corporation, Oil City Community Development Corporation, Oil Heritage Region, Inc., and Oil Heritage Region Tourism Promotion Agency merged to form ORA. These organizations had for several years been co-located and conducted a range of joint activities supporting the heritage, economic development, and tourism destination marketing of the Oil Region and the resources that are encompassed within the ORNHA boundaries. A detailed list of the accomplishments is included in Appendix 4. A few of the key milestones include:

**Table 2.1 ORNHA Timeline**

Year	Activity
1989	• Feasibility Study for “Oil Region Heritage Park” contributors Mary Means and Associates
1994	• Governor Casey designated PA Oil Heritage Park
2004	• Oil Region National Heritage Area was designated by the United States 108th Congress through Public Law 108-44
2005	• ORA established with the merger of Venango Economic development Agency, Oil City Community Development Agency, Oil City Community Development Corporation, Oil Heritage Region Tourist Promotion Agency, and Oil Heritage Region, Inc.
2006	• “Oil Heritage Region Management Plan Augmentation 2006” prepared by ICON Architecture, Inc. in association with Vanasse, Hangen, Brustlin, Inc.
2010	• “Oil Region Alliance Strategic Business Plan for 2010-2015” prepared by ORA
2015	• “Oil Region Alliance 2014 Annual Report and 10-Year Review” prepared by ORA
2015	• “ORNHA Sustainability Plan” prepared by Lardner Klein Landscape Architects, P.C.

## Section 3 – NHA Fulfillment of the Authorizing Legislation and Management Plan

### 3.1 Goals and Objectives of the National Heritage Area (NHA)

In authorizing the Oil Region National Heritage Area (ORNHA), Public Law 108-447 outlined the following purpose:

- To enhance a cooperative management framework to assist the Commonwealth of Pennsylvania, its units of local government, and area citizens in conserving, enhancing, and interpreting the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic development for the benefit and inspiration of present and future generations in the Commonwealth of Pennsylvania and the United States.

In order to fulfill this purpose, the ORNHA developed a management plan that established the following mission goals:

#### Heritage Development

- Implement large-scale changes to Drake Well Museum and Park.
- Enhance other core sites (e.g., Oil Creek & Titusville Railroad).
- Conduct a feasibility study of natural gas exhibits.

- Build regional identity.
- Increase signage.
- Supplement archive space.

#### Economic Development

- Contribute to economic growth generally.
- Create a system that tracks economic impact.

#### Tourism Destination Marketing

- Utilize the Allegheny River more for boating and fishing.
- Expand the trail system.
- Maintain focus on accommodation.

During the Meet and Greet visit in December 2015, the Oil Region Alliance of Business, Industry, and Tourism (ORA) staff and the evaluation team constructed a logic model that related the mission goals and objectives to three strategy and activity areas:

- Heritage development
- Economic development
- Tourism destination marketing

The relationships between the authorizing legislation purpose, the ORNHA General Management Plan, and the Strategy and Activity areas can be seen in Table 3.1.

**Table 3.1 ORNHA Goals and Activities**

Purposes as Specified in Legislation	Management Plan Goals	Current Goals/Activities
“Conserve, enhance, and interpret the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic”	Heritage Development Mission Goals Economic Development Mission Goals Tourism Destination Marketing Mission Goals	Heritage Development Economic Development Tourism Destination Marketing

## 3.2 NHA Activities and Impacts

The logic model depicting the relationships between ORNHA's goals, resources, partners, strategies/activities, and outcomes is presented in Figure 3.1.

ORA provides leadership and support to organizations throughout the ORNHA through the following activities that support the strategies identified in the logic model:

- Collaboration across the three strategy/activity areas. Collaboration activities include partnering with other regional heritage development, economic development, state, and Federal partners (e.g., National Park Service (NPS)) to achieve ORA vision.
- Technical Assistance across the three strategy/activity areas. Technical assistance activities include bringing in subject matter experts for community discussions, providing guidance on grant writing to partners, and assisting partners with program/project management.
- Strategic Planning across the three strategy/activity areas. ORA has established organizational and political partnerships at the local, state, and Federal levels, which are resources in collaborative planning with partners. Examples of strategic planning include feasibility studies and the recent sustainability plan, which lists multiple future pathways for ORA. The sustainability plan is discussed further in Section 5 of this report.

In the next sections, we describe each of these Strategy and Activity Areas and the extent to which they have achieved the intended outcomes.

The logic model depicts the relationships between ORA goals, inputs, organizations, activities, and outcomes across the three program areas of heritage development, economic development, and tourism destination marketing. The first column details the goals of ORNHA, which are identical to the goals of ORA. Next, the logic model lists inputs and resources such as nationally significant resources and legislation. The third column outlines the coordinating entity (ORA) and organizations involved with ORA's activities. The remaining columns are divided into groups of activities according to ORA's three program areas:

heritage development, economic development, and tourism destination marketing. Across program areas, ORA works with partners by providing programming and grant support. The last columns of the logic model detail the short- and long-term outcomes of ORA. The discussion of program outcomes in the remainder of Section 3 includes many of the long-term outcomes described in the logic model.

We gathered evidence for the impact of ORA's efforts across the ORNHA through site visits, key informant interviews, document reviews, and intercept interviews with community members. In particular, we documented the activities and outcomes that focused on ORA's stated goals within its mission.

The following subsections detail the program activities and many of the outcomes for each of the three strategy/activity areas of heritage development, economic development, and tourism destination marketing.

### 3.2.1 Heritage Development Description of Activities

The small towns of the Oil Region are replete with historic remnants from the formerly booming era of the commercial petroleum industry. Victorian homes in Franklin, Oil City, Emlenton, and Titusville attract the attention of visitors, and ORA focuses a portion of its efforts to persuade artists, writers, and others to move to the region.

Table 3.2 highlights a sample of Heritage Development Programs of ORA.

ORA implements a number of heritage efforts throughout the ORNHA by:

- Preserving cultural resources within the Oil Heritage Region;
- Enhancing and preserving the region's recreational and natural resources;
- Developing heritage resources and attractions;
- Supporting and collaborating with municipalities, businesses, members, and partners in joint projects; and
- Producing educational materials, documentaries, and events.

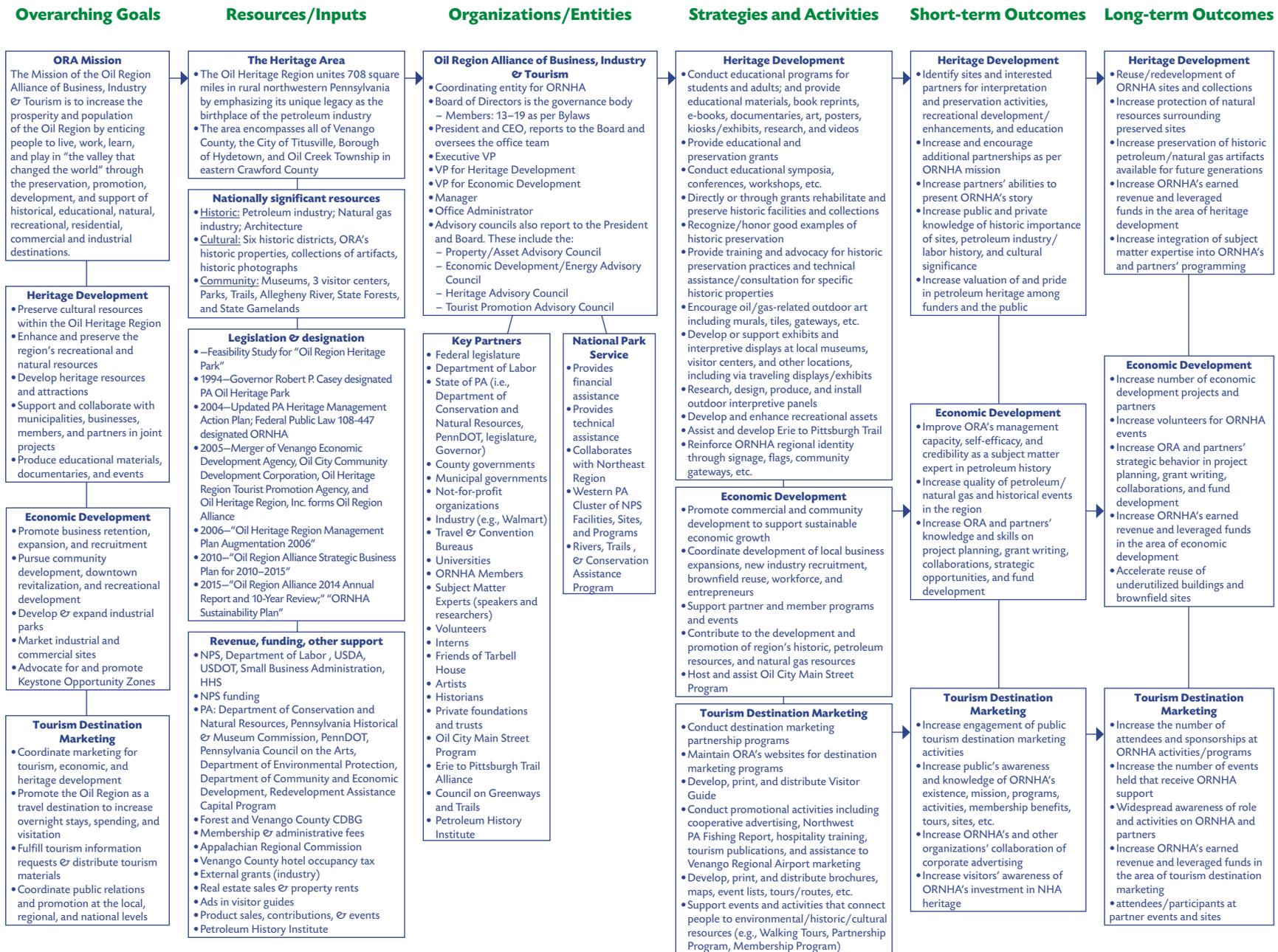


Figure 3.1 ORNHA Logic Model

**Table 3.2 Examples of Heritage Development Activities**

Year Started	Project
2005	Began rehabilitating Neilltown Church Building (private donations)
2005	Installed interpretive signage along Bike Trails
2005	Established Titusville Walking Tour
2005	Began work on President Township Canoe Landing
2005	Conducted Oil Heritage Region Trail Assessment Study
2005	Constructed more miles of Bike Trail
2005	Administered Tourism Awareness Survey
2005	Built more indoor kiosks
2005	Installed more major literature holders
2005	Displayed traveling photo exhibit
2005	Studied Special Events Rail Car for OCE&TRR
2005	Inaugurated Perry Street Visitor Orientation Center
2005	Conducted local/regional planning reviews
2005	Supported development of ORA
2005	Inventoried and appraised Natural Gas Artifact Collection
2005	Rehabilitated interior of Coal Oil Johnny House
2006	Reprinted and distributed 12 oil history books that had been out of print
2006	Neilltown Church Building name to PA Most Endangered Historic Properties List
2006	Revised OHR Management Plan
2006	Began planning 2009 Sesquicentennial Discovery of Oil
2007	Refurbished drilling rig at Drake Well Museum
2007	Furnished and installed exhibits at Coal Oil Johnny House
2007	Mapped former Oil Boomtowns, Oil Farms, and Historic Oil Wells in Oil Creek State Park
2007	Conducted feasibility study for a Natural Gas Museum
2007	Finished design and then constructed two scenic overlooks in Oil City
2007	Constructed and dedicated Community Gateway in Titusville
2007	Constructed new emergency exit from Lyric Theatre
2007	Selected vendors and drafted script for OIL150 documentary broadcast-quality film
2007	Expanded collaborative marketing of Oil Creek State Park and State Forest at Kennerdell
2007	Acquired Tarbell House (via a grant/loan combination from Preservation PA, Inc.); prepared preservation plan Tarbell House

**Table 3.2 Examples of Heritage Development Activities** (continued)

Year Started	Project
2008	Surveyed oil/gas historical sites within Oil Creek State Park
2008	Introduced region-wide historic house plaque program
2008	Offered and installed series of bike racks at key attractions
2008	Began design process for Oil Region visitor center in Oil City
2008	Constructed full-size derrick along I-80 in Barkeyville
2008	Videotaped “Stories of a Third-Generation Independent Oil Producer, as told by Bill Huber”
2008	With WQED, produced and distributed OIL150 documentary broadcast-quality film
2009	Improved Kennerdell Outlook
2009	Produced and installed visitor center inside Perry Street Station in Titusville
2009	Selected site for and designed exhibits for new Visitor Orientation Center in Oil City
2009	Provided “Preservation Consultation Services” to owners in the Historic Districts of the Oil Region
2009	Conducted comprehensive historic site survey in Northeastern Venango County
2009	Constructed extension of McClintock bike trail in Cornplanter Township and Oil City
2009	Coordinated and hosted major symposium on “The Philanthropic Legacy of the Oil Pioneers”
2009	Published new biography of Edwin Drake, and other new Oil History Books
2010	Painted Tarbell House exterior
2010	Hosted 11 volunteer workshops re: wooden windows
2010	Constructed enhancements and safety improvements at Murray’s Scenic View
2010	Printed and distributed “Oil History Timeline” posters included in OIL 150 Museum kits nationwide
2010	Printed “PA Crude” book and road trip DVD
2010	Produced new ORNHA flags and provided to partners
2010	Designed Oil City Visitor Center
2011	Provided educational materials/posters to schools in ORNHA; conducted teacher workshop
2011	Developed brochures for Tarbell House, Coal Oil Johnny House, and Neilltown Church
2011	Provided improved climate-controlled locations for Natural Gas Artifact Collection
2011	Acquired and then conducted engineering for new trailhead and canoe/kayak launch at Oil Creek Landing (private donations)
2011	Expanded non-fiction book inventory, and widen sales distribution thereof

**Table 3.2 Examples of Heritage Development Activities** (continued)

Year Started	Project
2011	Performed detailed engineering for trails/trailheads for Titusville Queen City Bike Trail, McClintock Bike Trail, and through Borough of Emlenton; (segments of Erie to Pittsburgh Trail)
2012	Developed parts of Erie to Pittsburgh Trail
2012	Printed art lover’s guide to libraries within ORNHA
2013	Completed additional trail work
2013	Finished walls, floors, and ceilings of Tarbell House
2013	Printed “Victorian Architecture in the ORNHA” brochure
2014	Prepared preservation plan for the Downs Building
2014	Installed Erie to Pittsburgh Trail logo signs on multiple trail segments in ORNHA
2014	Dedicated Oil City Visitor Center inside Venango Museum
2015	Created Natural Gas Industry History traveling exhibit
2015	Hosted Victorian architecture conference
2015	Began E-books project
2015	Installed more Interpretive panels
2015	Enhanced Allegheny-Clarion River Valley Blueprint Communities Project

After the 2005 merger between the Oil Heritage Region, Inc., Venango Economic Development Corporation, the Oil City Community Development Corporation, and the Oil Heritage Region Tourism Promotion Agency, heritage activities continued under the administration of ORA in line with the Management Action Plan. ORA collaborates with multiple partners to conduct educational and interpretive activities, perform historic preservation, develop cultural events, and construct recreational facilities (e.g., bicycle trails, trailheads). Additionally, ORA works with volunteers to build capacity and leverage relationships across a variety of organizations such as historical societies and local museums. ORA also supports multiple feasibility studies before carrying out large projects (e.g., natural gas).

#### ***Preserving cultural resources within the Oil Heritage Region***

ORA’s involvement in heritage activities expands beyond Titusville into the entirety of the ORNHA. Other projects include the preservation of the Nielltown Church building outside of Pleasantville, PA. For more than 10 years, ORA has supported a number of concerts at the renovated Nielltown Church, which was listed on Pennsylvania’s Most Endangered Historic Properties list in 2006. Additionally, ORA has hosted multiple conferences of Victorian architecture throughout Franklin, Oil City, and Titusville, attracting hundreds of people to educational workshops, tours, and dinners. Additionally, ORA has worked with partners to increase signage throughout the region such as the Oil Region Historic House Plaque Program and the more than 80 interpretive panels throughout the ORNHA.

### **Enhancing and preserving the region’s recreational and natural resources**

ORA has participated in projects that contribute to recreation activities throughout the ORNHA. ORA has partnered with trails associations to create and improve bicycle trails, pedestrian walkways, and trailheads. The Erie to Pittsburgh Trail (EPT) crosses the region from North to South, and ORA together with partners completed the 3.5 mile McClintock Trail, which resolved a gap in the EPT system. An additional example of a heritage activity focused on recreation is the Oil Creek Memorial Landing. This dual purpose waterfront attraction serves as a trailhead and a launching point for canoes and kayaks.

### **Developing heritage resources and attractions**

ORA purchased the family home of Ida Tarbell in Titusville in 2007. The Tarbell House was purchased in 2007 thanks to a grant/loan combination from Preservation PA, Inc.; and the loan portion was then reimbursed to ORA as a grant from the Pennsylvania Department of Conservation and Natural Resources. The home was in disrepair and continues to undergo renovations. As more of the home was renovated, ORA supported multiple educational activities to highlight the historical relevance of the home to the local community. For example, students from the local high school host teas at the Tarbell House, which have been consistently sold out. Stakeholders described the Tarbell House as a “catalyst” for visitors to take interest in the heritage of the region. Respondents also suggested that heritage projects like the Tarbell House benefit attendance to other area attractions (e.g., the Oil Creek and Titusville historical train rides).

### **Supporting and collaborating with municipalities, businesses, members, and partners in joint projects**

ORA has collaborated with partners on a number of heritage activities, and multiple respondents reported satisfaction with local heritage efforts. For example, ORA worked extensively with the Friends

of Drake Well to improve the replica of the well as well as exhibits at the local museum. Many of the items from ORA’s natural gas artifact collection have been transferred to Drake Well Museum and been accessioned permanently by the Commonwealth of Pennsylvania. ORA facilitated the 150th year celebration of Oil (OIL 150), a 17-month celebration from August 1, 2008 through December 31, 2009. OIL 150 celebrated the first commercial source of petroleum at Drake Well in 1859 that encompassed many area events.

### **Producing educational materials, documentaries, and events**

Interviewees and annual reports discussed additional activities such as publishing books and converting books into e-books. Titles include *Coal Oil Johnny – His Book*, *The Derrick Handbook of Petroleum*, *Oil City Victorian Houses*, *The Oil Well Driller*, and *Pithole – The Vanished City*. These books are sold at partner locations throughout the ORNHA.

### **Heritage Development Outcomes**

We examined the following outcomes for Heritage Development activities:

- Reuse/redevelopment of the ORNHA sites and collections.
- Increase protection of natural resources surrounding preserved sites.
- Increase preservation of historic petroleum/natural gas artifacts available for future generations.
- Increase integration of subject matter expertise into the ORNHA’s and partners’ programming.

### **ORA has successfully fulfilled the legislative requirements in meeting Heritage Development Activity goals.**

Table 3.3 shows the total number of visitors to the main attractions within the ORNHA.

**Table 3.3 Visitors to ORA**

Year	Total number of visitors to main attractions within heritage area
2009	74,507
2010	69,436
2011	198,022
2012	239,641
2013	233,122

#### *Reuse/redevelop ORNHA sites and collections*

Multiple historian informants noted the importance of ORA's reuse and redevelopment of sites and collections in the ORNHA. Other stakeholders described the thousands of visitors to the ORNHA sites including the Tarbell House or the Drake Well Museum. According to ORA reports to NPS, more than 200,000 visitors came to main attractions within the ORNHA in 2013 (the most recent year with data). Respondents suggested that ORA serves to link the sites and collections across the ORNHA. Interviewees stated that visitors at one site would learn about the other sites and explore sites throughout the region. According to the most recent reports from the ORA to NPS in 2013 and 2014, ORA began or continued working on three physical historic preservation projects in each respective year.



Tarbell House

#### *Increase protection of natural resources surrounding preserved sites*

In terms of preservation of natural resources, ORA reports completing new trails such as 2 miles of new trails in both 2009 and 2013. ORA consciously strives

to protect additional natural resources surrounding heritage sites, but interviewees and documents suggest that ORA could do more to satisfy this mission-driven goal. Generally, respondents appreciated the efforts that ORA is pursuing to protect natural resources in the NHA. The 2015 sustainability report suggests ways that ORA might move forward to further protect natural resources surrounding preserved sites.

#### *Increase preservation of historic petroleum/natural gas artifacts available for future generations*

ORA has increased the amount of activities around the preservation of historic petroleum and natural gas artifacts for future generations. For example, ORA in 2002 received a donation of natural gas artifacts, many of which have been transferred to the Drake Well museum archive. Additionally, ORA is working with partners on a new portable exhibit of natural gas titled "Walking the Line." This exhibit was funded partially with NPS support, and many interviewees were impressed with the quality of the product. Additionally, ORA reported to NPS that two historic sites were preserved in each of the most recent years with data (2013 and 2014).

#### *Increase integration of subject matter expertise into ORNHA's and partners' programming*

ORA is working to increase the integration of subject matter expertise into the ORNHA's and partners' programming. For instance, respondents reported Titusville schools working with the Tarbell House to integrate the history of Ida Tarbell into their curriculum while students shared stories with visitors during tea at the Tarbell house. Additionally, ORA maintains or adds over 10 educational programs each reported year with data (reports to NPS from 2009 to 2014).

### **3.2.2 Economic Development**

#### **Description of Activities**

ORA's goals of economic development activities are to promote business retention, expansion, and recruitment; pursue community development, downtown revitalization, and recreational development; develop and expand industrial parks;

market industrial and commercial sites; and advocate for and promote Keystone Opportunity Zones. These activities fulfill the requirements of the authorizing legislation to encourage economic viability in the ORNHA and consider the interests of diverse governmental, business, and nonprofit groups within the ORNHA. Additionally, the goals correspond to the primary recommendation in the management action plan update (2006) of contributing to economic growth generally and creating a system that tracks economic impact.

Table 3.4 highlights a sample of Economic Development Programs of ORA.

**Table 3.4 Examples of Economic Development Activities**

Year Started	Project
2005	Drafted foreign trade zone and airport marketing and action plan
2005	Coordinated Keystone Opportunity Zone
2005	Participated in industrial recruitment
2005	Created database (Demographicsnow.com)
2005	Began business retention and expansion program (BREP)
2005	Initiated InVest workforce development program
2005	Facilitated quarterly breakfast programs (“The Breakfast Club”)
2005	Maintained database of properties along the Routes 8 and 62 corridor
2005	Acquired land for Allegheny Overlook Housing Development
2006	Started groundbreaking for Barkeyville Industrial Park (state and local funds)
2006	Secured Foreign Trade Zone designation for airport property
2006	Constructed Allegheny Overlook Apartments; fully occupied in less than 90 days
2006	Replaced boilers at Crawford Center and National Transit Buildings
2007	Conducted direct mail marketing of New Industry
2007	Targeted advertising

Year Started	Project
2007	Hosted prospect visits, attended trade shows, and joined networks
2007	Supported seminar series
2007	Purchased West Unit building in Franklin (private funds)
2007	Acquired more land to expand Sandycreek Industrial Park (via funds from ORA investment account) (private funds)
2007	Bolstered broadband initiative
2007	Supported municipal government outreach
2008	Assisted expansions of FedEx, Latrobe Steel, IPEG, Vantage Holding Company, and Glenn Hawbaker
2008	Investigated Brownfield development
2008	Implemented Southern Venango designated growth areas
2008	Encouraged local business expansion
2008	Analyzed BREP interview results
2009	Focused on local industry development
2009	Applied for Oil City Main Street Community designation, with City of Oil City
2009	Designated by PA DCED to administer PIDA loans
2009	Received RCAP grant notice to expand Sandycreek Industrial Park
2010	Developed a library of information
2010	Hosted Marcellus Shale Showcase, webinars, and business technical assistance
2010	Began engineering work on expansion of Sandycreek Industrial Park
2010	Assisted expansions of Matric, Franklin Bronze, Penn North
2011	Established and provided office for Venango Co. Chapter of SCORE
2011	Created an Oil Region incentive program
2011	Transformed ORA website for economic development
2011	Developed and implemented “strategic response program”
2011	Worked with other municipalities to spur small business activities
2011	Used “Cluster Industry” target marketing approach

**Table 3.4 Examples of Economic Development Activities (continued)**

Year Started	Project
2012	Developed infrastructure at Sandycreek
2012	Supported oil and gas industry development
2012	Acquired land for future Cranberry Township Adult Living Community (private funds)
2012	Inspected Emlenton Brownfield
2012	Began Erie to Pittsburgh Trail Entrepreneurship Business Plan Contest (Get on the Trail)
2013	Encouraged new business development (local expansion and trail/waterway-based development)
2013	Purchased Downs Building (local funds)
2014	Dedicated the expanded SandyCreek Industrial Park
2014	Continued Oil/Gas/Marcellus technical assistance
2014	Continued municipal assistance and revolving loan funds
2015	Engaged in workforce development program

ORA implements a number of economic development efforts throughout the ORNHA by:

- Promoting commercial and community development to support sustainable economic growth;
- Coordinating development of local business expansions, new industry recruitment, brownfield reuse, workforce, and entrepreneurs; and
- Hosting and assisting Oil City Main Street Program.

#### **Promoting commercial and community development to support sustainable economic growth**

ORA carries out a number of economic development initiatives, including recruiting outside investments as well as expanding local business development. Before 2011 ORA maintained a higher degree of

distinction across the three legs of the stool (heritage development, economic development, and tourism destination marketing). After 2011, however, ORA has focused more on integrating projects across activity types. ORA staff report that future activities will increasingly blur the borders of the previously distinct areas of heritage development, economic development, and tourism destination marketing strategies. For example, the “Get on the Trail Entrepreneurial Business Plan Contest” along the Erie to Pittsburgh Trail encourages new business growth and the expansion of existing businesses. This program not only focuses on economic development, but it also supports tourism destination marketing by providing goods and services to people using the trails throughout the ORNHA. Additionally, the program contributes to heritage development because multiple businesses are housed in trailside historically significant settings.

#### **Coordinating development of local business expansions, new industry recruitment, brownfield reuse, workforce, and entrepreneurs**

ORA contributes to economic development through the development of industrial parks. For instance, ORA assisted WS Packaging with an expansion at the Sandycreek Industrial Park that retained 115 local jobs and created 30 new ones. The ORA used funds from their investment account in order to purchase the land for the Sandycreek Industrial Park; the investment account was established when the Oil City Community Development Corporation (one of the nonprofits which merged in 2005 to form the ORA) sold the former Quaker State Headquarters Building to the Commonwealth of Pennsylvania to be used as the PA Dept. of Transportation District Engineering Office and also by the PA Department of Labor and Industry as the local job center. Additionally, FedEx and Latrobe Steel expanded operations at the Sandycreek Industrial Park. An additional park was the Barkeyville Industrial Park in southern Venango County. On our site visit, multiple interviewees suggested that ORA should maintain their current focus on recruiting businesses to the area and supplying locations for them.

Additional economic development activities combine recreational activities with a dual purpose of protecting natural resources such as the brownfield development projects throughout the NHA. A brownfield is a former industrial site with environmental concerns that restrict development. For example, ORA has identified a brownfield in Emlenton that surrounds the portion of the Erie to Pittsburgh Trail in southern Venango County. According to ORA staff, ORA will be moving forward to reclaim this brownfield and others to contribute to the preservation of the NHA's former industrial sites.

#### ***Hosting and assisting Oil City Main Street Program***

Partnerships between ORA and local economic development initiatives are widespread. For example, ORA partners and shares office space with the Oil City Main Street Program, an initiative that focuses on revitalizing downtown Oil City. This volunteer driven organization hosts activities such as the Façade Improvement Grant Program, "Best Dressed Windows" contests, and "Get Down to Business" workshops. Successes of the program include the initiation of the Downtown Mural Program, creation of a town square, and establishment of Oil City as an official Trail Town. Respondents reported that the Oil City Main Street Program contributed to all three types of activity areas (i.e., Heritage Development, Economic Development, and Tourism Destination Marketing).

A comprehensive list of Economic Heritage Activities can be found in Appendix 7.

#### **Economic Development Outcomes**

We examined the following outcomes for economic development activities:

- Increase number of economic development projects and partners.
- Increase volunteers for the ORNHA events.
- Increase ORA and partners' strategic behavior in project planning, grant writing, collaborations, and fund development.
- Accelerate reuse of underutilized buildings and brownfield sites.

#### **ORA has successfully fulfilled the legislative requirements in meeting Economic Development Activity goals.**

##### ***Increase number of economic development projects and partners; increase volunteers for the ORNHA events***

Since ORA was formed from the merger of four organizations in 2005, the pool of economic development projects and partners has remained strong. ORA has more than two dozen partners in any given year. The diverse mix of partners carries out a variety of activities. For example, ORA partnered with First National Bank to build the Allegheny Overlook Apartments to contribute to housing needs in Oil City. The Allegheny Overlook Housing Development land was purchased by the City of Oil City (it is the site of a former high school building, within Oil City Area School District) using funds granted to the City of Oil City by the Commonwealth and other funds from a local bank. The land was purchased prior to 2005, thus prior to the formation of the Oil Region Alliance and prior to the designation of the Oil Region National Heritage Area. The land once developed transferred to the Drake Commons Partnership.

Projects such as this are often across divisional lines within the ORA (including the Heritage Development division). According to the 10-year review in the 2014 annual report, the apartments were fully occupied in fewer than 90 days. Other economic development partners include local chambers of commerce, Venango College, and many local businesses. In terms of the number of volunteers at NHA events, according to reports from NHA to NPS, over 100 volunteers have participated in ORA projects in 2013 and 2014.

##### ***Increase ORA and partners' strategic behavior in project planning, grant writing, collaborations, and fund development***

ORA has increased the capacity for strategic behavior in project planning, grant writing, collaborations, and fund development across the NHA. For instance, in 2011 ORA established and continues to house the Venango County branch of SCORE. Mentors with SCORE provide free and confidential consulting services to local businesses and entrepreneurs. Other

efforts include the “Get on the Trail’ Entrepreneurial Business Plan Contest,” which linked contestants with mentorship from SCORE and the Clarion Small Business Development Center. Additionally, ORA has coordinated financing of multiple economic development projects that created employment for child development professionals. According to annual reports, in 2011 ORA coordinated the financing of \$750,000 from First National Bank, the Venango Industrial Development Authority, and a bond company to construct the Child Development Center in Oil City (the money was completely assembled and managed by Child Development Center, Inc.), creating 15 new job opportunities. In 2014, an additional \$700,000 was provided by the same two sources for an expansion of the Child Development Center in Cranberry Township.

#### ***Accelerate reuse of underutilized buildings and brownfield sites***

As described above, ORA has participated in an increasing number of activities related to the reuse of underutilized buildings and brownfield sites. For instance, the Downs Building – originally built in 1894 and located on the Erie to Pittsburgh trail – was in disrepair until ORA acquired it in 2013. The Downs Building was purchased by ORA using funds granted to ORA by the Oil City Redevelopment Authority. The building is currently undergoing rehabilitation, and the renovated property will include a trail-focused business on the ground floor along with residential space on the upper floors. Multiple interviewees discussed brownfield redevelopment initiatives, and discussions were more about planning than progress.

As illustrated in the recent ORA’s sustainability report, brownfield redevelopment remains one of the most important activities for ORA moving forward. There is a tension between the expensive cost of redeveloping brownfields and the potential inability to generate economic development in the ORNHA. The report claims that brownfield redevelopment would have the greatest potential but also the greatest risk for revenue generation.

### **3.2.3 Tourism Destination Marketing**

#### **Description of Activities**

ORA’s goals of tourism destination marketing activities are to coordinate marketing for tourism, economic, and heritage development; promote the Oil Region as a travel destination to increase overnight stays, spending, and visitation; fulfill tourism information requests and distribute tourism materials; and coordinate public relations and promotion at the local, regional, and national levels. These activities fulfill the requirements of the authorizing legislation to develop recreational resources, increase public awareness of and appreciation for the natural, historical, and architectural resources and sites throughout the Heritage Area. Additionally, the goals correspond to the following primary recommendations in the management action plan update (2006): the Allegheny River should be utilized more for boating and fishing, the trail system should be expanded and completed, and a focus on accommodation should be maintained.

Table 3.5 highlights a sample of Economic Development Programs of ORA.

**Table 3.5 Examples of Tourism Destination Marketing Activities**

Year Started	Project	Year Started	Project
2005	Continued tourism advertising	2009	Oversaw OIL150 Marketing
2005	Printed and distributed visitor guide	2009	Upgraded www.oilregion.org and www.alleghenygeotrail.com
2005	Conducted tourism awareness survey	2009	Hosted PA Outdoor Writers Association Conference in Oil City
2005	Carried out FAM tour and hospitality training	2010	Coordinated Venango County video writing, shooting, and editing
2005	Participated in travel and conferences (e.g., PA Convention & Visitor's Bureau)	2010	Implemented Northwest PA Fishing Reports, a weekly electronic newsletter
2005	Created Oil Heritage Region tear-off maps	2010	Printed and distributed Oil Region Visitor Guide
2005	Installed literature racks for brochure distribution	2010	All ORA staff participated in Venango Video Auction, ORA Annual Meeting and FUNdraiser events
2005	Supported renaissance tours by Bonnie Radwick	2010	Conducted ORA membership satisfaction survey
2005	Sponsored Kennerdell Art Festival	2011	Contacted all hospitality providers for discount coupons online
2005	Co-hosted Allegheny River Bass Buddy Fishing Tournament	2011	Designed travel itineraries for www.oilregion.org
2005	Carried out regional marketing for PA Great Lakes Region (e.g., Fishing Guide)	2011	Designed, printed, and distributed visitor guides
2005	Developed eco-tourism	2011	Promoted Oil Region for golf outings
2006	Co-sponsored Preservation PA Conference in Franklin	2011	Showcased "Week-End" tourism opportunities
2006	Printed and distributed Oil Region Visitor Guides	2011	Promoted Oil Region for conferences
2006	Responded to 55,000 requests for destination information	2011	Championed motor coach promotion
2006	Activated website www.oilregion.org	2011	Designed unique programs that tell story of local culture, arts, and humanities (e.g., Arts on 8)
2007	Hosted Birding Event in May	2012	Designed, printed, and distributed Oil Region Visitor Guide
2007	Supported television/outdoor marketing	2012	Hosted annual OHR Historic Preservation Awards program and ceremony
2007	Conducted familiarization tour for attractions and lodging	2012	Hosted multiple visits by PA DCED leadership to the Oil Region
2007	Created biking map, road tour book, and motor coach book, with PGLR	2012	Conducted trail utilization study focusing on bicycle trail segments along the Erie to Pittsburgh Trail within the ORNHA
2007	Established steering committee of OIL150	2012	Introduced website www.grabtrails.com with the slogan "Grab Life by the Trails"
2007	Initiated Allegheny Geocaching Trail	2013	Participated in Trail/Waterway destination marketing
2008	Hosted birding festival		
2008	Co-hosted FUNd raiser—dinner and reverse raffle		
2008	Bolstered Oil Country Cruise		
2009	Drafted Venango Regional Airport (marketing plan)		
2009	Organized Wildcatters and Oil Barons Project		

**Table 3.5 Examples of Tourism Destination Marketing Activities** (continued)

Year Started	Project
2013	Developed and implemented significant multi-year marketing plan
2013	Expanded Allegheny GeoTrail program
2013	Hosted “The Gusher” ATV and motorcycle race based in Foxburg
2013	Shifted marketing focus to Pittsburgh/Youngstown/Cleveland
2014	Printed and distributed Oil Region Visitor Guide
2014	Enhanced social media activity
2014	Maintained visitor information kiosks at Cranberry mall, local chambers of commerce, and Crawford Center
2014	Published Hiking-Biking-Water Trails maps of region, with PaGLR
2015	Hosted Victorian Architecture conference in Franklin
2015	Printed and distributed Oil Region Visitor Guide



Oil Creek and Titusville Railroad

ORA implements a number of tourism destination marketing efforts throughout the ORNHA by:

- Conducting promotional activities including cooperative advertising, Northwest PA Fishing Report, hospitality training, tourism publications, and assistance to Venango Regional Airport marketing;
- Supporting events and activities that connect people to environmental/historic/cultural resources (e.g., Walking Tours, Partnership Program, Membership Program); and
- Developing, printing, and distributing the Oil Region Visitor Guide.

***Conducting promotional activities including cooperative advertising, Northwest Pennsylvania Fishing Report, hospitality training, tourism publications, and assistance to Venango Regional Airport marketing***

ORA participates in a number of tourism destination marketing activities including supporting partner programs and cooperative advertising. For example, since 2010 ORA together with the Pennsylvania Great Lakes Region (PaGLR) have produced a year-round series of NW PA Fishing Reports. In recent years, the partnership has strengthened with the creation of a biking map, fishing brochure, road tour book, motor coach book, and a hiking-biking-water trails map of the region. Other partnership activities include multi-day visits with tour operators and bus companies in New York, West Virginia, Kentucky, and Ohio to market the region as a tourist destination. Additionally, ORA had display booths at trade shows in Erie, PA; New York; Ohio; and Washington, DC.

***Supporting events and activities that connect people to environmental/historic/cultural resources***

In conjunction with partnering activities and according to multiple sources such as annual reports, ORA has facilitated events that bring in large numbers of visitors to the region. For instance, ORA has had a role in the River Romp, Kennerdell Art and Music Festival, Mr. Whiskers Catfish and Carp Fishing Derby, Allegheny River Bass Tournament, Oil Country Cruise, Oil Region Birding Festival, and “The Gusher,” an ATV and motorcycle race by the Grand National Cross Country

Series. Respondents supported the large numbers of events that ORA facilitates and suggested that this is one of the primary ways that they can market themselves. Additionally, many interviewees stated that ORA should continue to focus on uniting the regional identity of the ORNHA through such events and outreach.

### ***Developing, printing, and distributing Visitor Guide***

Printing and distributing the Visitor Guide and brochures are another primary activity of ORA. The annual visitor guides provide information about restaurants, lodging facilities, parks, and recreation throughout the ORNHA. ORA distributes the free guide widely at local facilities, rest stops, turn-pike plazas, and the Grove City Outlet Mall. ORA stakeholders reported long hours working on the Visitor Guide, especially by the Tourist Promotion Advisory Council. On our site visit, the most recent version of the 2016 Visitor Guide was available at almost all of the sites we visited.

A comprehensive list of Tourism Destination Marketing Activities can be found in Appendix 8.

### **Tourism Destination Marketing Outcomes**

We examined the following outcomes for tourism destination marketing activities:

- Increase the number of attendees and sponsorships at the ORNHA activities/programs.
- Widespread awareness of role and activities on the ORNHA and partners.

### **ORA has successfully fulfilled the legislative requirements in meeting Tourism Destination Marketing Activity goals.**

#### ***Increase the number attendees and sponsorships at ORNHA and partner activities/programs***

There are multiple examples supported by data (e.g., documents, respondent reports) of new events that bring increasing numbers of attendees and sponsorships within the ORNHA. For example, according to the 10-year review in the 2014 report, in 2010 ORA partnered with Keystone Community

Education Council, local chambers of commerce, and the NW PA Oil and Gas Hub to host the Marcellus Shale Showcase, which brought in over 1,000 visitors. Additionally, as previously described, “The Gusher” event brought nearly 3,000 visitors to the River Stone Estate in Foxburg in 2013. By far, the trails bring the largest numbers of visitors through the ORNHA. In 2013, the Erie to Pittsburgh Trail User Survey and Economic Impact Analysis found that over 150,000 people used just the bike trails and spent more than \$6 million per year. Interviewees confirmed the increases in attendance and volunteer hours. For example, interviewees discussed the increasing numbers of visitors to the Tarbell House in Titusville, which had few visitors before ORA acquired (via grant/loan combination from Preservation PA, Inc.) and renovated this property.

One notable challenge is a strained relationship with officials in Titusville after newly elected leadership expressed less interest in linking Titusville to the rest of the ORNHA. Multiple respondents pointed out the challenges that ORA faces when partnering with Titusville stakeholders. Despite these issues, ORA continues working in Titusville. In fact, some of the most notable successes (e.g., Tarbell House) are located in Titusville. In the future, ORA should continue strengthening its relationship with Titusville leadership to truly project the regional focus within the ORNHA.

#### ***Widespread awareness of the role and activities of the ORNHA and partners***

Visitors to the ORNHA seemed generally aware of the role and activities of ORA. Of the 42 Intercept interviews, 74 percent were familiar with ORA logo and 83 percent were familiar with the history of the NHA region. Many respondents reported learning about the region in school, and there was overwhelming support that preserving the regional heritage was necessary. It is important to note that we conducted intercept interviews during our site visit in March, and results could differ in warmer seasons when more outsiders visit the NHA. Of those interviewed, 88 percent lived in the local area, and 98 percent of interviewees lived in Pennsylvania. ORA

staff have stated that they will continue efforts to increase awareness across the area through logos on trails, heritage sites, and with signage on roads that cross through the ORNHA.

According to the management action plan, after visitors come to the ORNHA, ORA should work on the mission stated goal of maintaining a focus on accommodation. ORA regularly works with local hotels and beds and breakfasts to improve accommodation access in the ORNHA. As the sustainability plan points out, however, ORA could do more to refocus its activities to reintroduce hospitality training. Such a focus could strengthen the awareness that visitors have of the ORNHA. Some respondents echoed the point that ORA should renew previous efforts to train hospitality workers.

### 3.3 Summary

**The Evaluation determined that over the last 11 years, ORA has addressed each of its legislated purposes and is working toward completing all of the goals outlined in the management plan through the Federal resources provided.** ORA has worked closely with the NHA regional liaison and other NPS entities. ORA provides leadership and support by providing collaboration, technical assistance, and strategic planning. Successful outcomes have been documented in the three activity areas of:

- Heritage Development
- Economic Development
- Tourism Destination Marketing



*McClintock Trail – bicyclist and train*



*Scouts looking up Drake Well Engine House*

We noted successes in each area of activity. One area that ORA might address in greater depth is brownfield redevelopment. This recommendation arises from interviews with key stakeholders, document reviews, and the recently completed sustainability plan. ORA is working toward this goal by taking steps to move forward with brownfield redevelopment such as the identification of a brownfield in Emlenton. Another area of improvement would be to strengthen ties with Titusville leadership in order to market the ORNHA regionally. One final recommendation is to renew the focus on accommodation activities. For the most part, however, ORA has successfully worked toward meeting its primary goals outlined in the management action plan. Long standing institutional histories; a strong relationship with local, state, and national partners; and a dedicated staff have all led to successful activities within the ORNHA.

## Section 4 – Public/Private Investments in ORNHA and Their Impact

The legislation that created the Oil Region National Historic Area (ORNHA) required the following concerning Federal National Park Service (NPS) appropriations to the ORNHA:

- (a) IN GENERAL.—There are authorized to be appropriated under this title not more than \$1,000,000 for any fiscal year. Not more than a total of \$10,000,000 may be appropriated for the Heritage Area under this title.
- (b) 50 PERCENT MATCH.—Federal funding provided under this title, after the designation of the Heritage Area, may not exceed 50 percent of the total cost of any activity carried out with any financial assistance or grant provided under this Act.

In this section, we describe the public and private investments that support the ORNHA activities, determine if ORA meets legislative requirements with regard to additional investments required, and summarize the ways in which ORA makes use of NHA investments. Note that although we were given audited financial statements, these statements did not provide the necessary granularity to analyze components of spending and revenue. Consequently, this section is based on non-audited financial summations provided by ORA, and in later sections, including additional revenue that was a part of the larger organization (additional details below).

As described in Section 2, ORA is the management entity for the ORNHA. In addition to managing ORNHA, ORA works to manage economic development and tourism destination marketing programs that receive much of their funding from non-NPS sources. In Subsection 4.1, we describe

investments directly related to the ORNHA activities (usually heritage development activities). In Subsection 4.2, however, we include expenditures across all ORA activities. We make this distinction because of the unique location of ORNHA activities under the umbrella organization of ORA. ORA has reported income and match to NPS with figures based on the tables in Subsection 4.1 (although figures differ from submitted reports, because expenditures of NPS and other revenues were not always finalized at the time of reporting). Even though Subsection 4.1 is based on ORA's reports to NPS, over time the extent to which activities are integrated across the three legs of the stool (heritage development, economic development, and tourism destination marketing) has increased. Thus Subsection 4.2 includes all of the activity types, because this is an accurate (and officially audited) representation of the integrated activities that ORA carries out.

### 4.1 Investments in the ORNHA Activities

The financial investments that support the ORNHA activities can be divided into the following categories:

- Federal NPS Funding – Funding provided to ORA through NPS since 2005; and
- Matching Funds– Funds raised to meet the matching funds requirement including state, local government, foundation, non-profit, corporate sponsors, in-kind donations, private and other non-Federal match.
- Leveraged Funds – Additional funds raised to support heritage area activities including matching funds, other Federal, state or local government, private or other funding.

**Table 4.1. Overview of ORNHA Investments Received by Year**

Year	NPS HPP Funds Allocated	NPS HPP NHA Funds Expended	NPS HPP Funds Carried Over (Cumulative)	Matching Funds (State Local Other Private)	Total
2005	\$154,000	\$923	\$153,077	\$155,000	\$309,000
2006	\$185,058	\$94,009	\$244,126	\$201,000	\$386,058
2007	\$236,470	\$158,311	\$322,285	\$171,000	\$407,470
2008	\$232,318	\$239,555	\$315,048	\$390,717	\$623,035
2009	\$232,318	\$332,818	\$214,548	\$1,503,758	\$1,736,076
2010	\$303,000	\$188,807	\$328,741	\$1,054,138	\$1,357,138
2011	\$312,500	\$409,810	\$231,431	\$917,057	\$1,229,557
2012	\$295,000	\$357,095	\$169,336	\$1,156,511	\$1,451,511
2013	\$288,000	\$306,866	\$150,470	\$306,865	\$594,865
2014	\$300,000	\$203,273	\$244,917	\$331,233	\$631,233
2015	\$315,000	\$311,414	\$245,990	\$330,123	\$645,123
<b>Total</b>	<b>\$2,853,664</b>	<b>\$2,602,881</b>	<b>–</b>	<b>\$6,517,402</b>	<b>\$9,371,066</b>

Note: Figures above are entirely from unaudited documents supplied by ORA. The Total column represents the sum of NPS HPP funds allocated plus matching funds.

ORA's financial statements indicate that between 2005 and 2015, \$9.37 million in NPS and matching financial resources were directed to related activities within ORNHA. Table 4.1 provides detail on the direct financial support for ORA in the form of NPS Heritage Partnership Program funding and matching sources. Note that matching funds have to be non-Federal. Other Federal funding secured from other agencies and grant sources is considered leverage, not match. Table 4.2 shows a list of other funding that ORA received. In 2013, ORA received a large grant from PennDOT. This funding was designated for the McClintock Trail South. The funding allowed the organization to implement activities that fulfilled the goals of the authorizing legislation and the

Management Plan, including: preservation, promotion, development and support of historical, educational, natural, recreational, residential, commercial and industrial destinations in the Oil Region.

ORA was eligible to receive up to \$10 million in appropriations under its authorizing legislation (with a maximum of \$1 million a year). However, the ORNHA did not receive the maximum amount of funds within any year. Instead, the average amount received per year was approximately \$259,424 or just over 25 percent of the maximum appropriation per year. The overall total was \$2.85 million or just over 28 percent of the maximum total appropriation.

**Table 4.2 ORNHA NPS Total Matching and Leveraged Funds by Federal Fiscal Year**

Year	NPS HPP Funds Expended	Other NPS Funds Expended	State Match	Local Match	Private/Other Match	Other Federal Funds	Total
2005	\$923		\$155,000			\$266,800	\$422,723
2006	\$94,009		\$196,000	\$5,000		\$137,043	\$432,052
2007	\$158,311		\$166,000		\$5,000	\$201,929	\$531,240
2008	\$239,555		\$226,070		\$164,647	\$83,737	\$714,009
2009	\$332,818		\$614,045	\$211,128	\$678,585	\$169,037	\$2,005,613
2010	\$188,807		\$446,234	\$271,397	\$336,507	\$184,379	\$1,427,324
2011	\$409,810		\$324,916	\$219,655	\$372,486	\$135,532	\$1,462,399
2012	\$357,095		\$316,174	\$150,356	\$689,981	\$102,747	\$1,616,353
2013	\$306,866		\$170,973	\$21,163	\$114,729	\$1,212,695	\$1,826,426
2014	\$203,273	\$2,280	\$175,508	\$54,725	\$101,000	\$83,727	\$620,513
2015	\$311,414	\$2,513	\$149,314		\$180,809		\$644,050
<b>Total</b>	<b>\$2,602,881</b>	<b>\$4,793</b>	<b>\$2,940,234</b>	<b>\$933,424</b>	<b>\$2,643,744</b>	<b>\$2,577,626</b>	<b>\$11,702,702</b>

As Table 4.2 shows, there are investments from numerous sources. It should be noted, that in addition to these sources there may be in-kind or other goods. But, by policy, ORA does not count nor track in-kind goods, services, supplies, equipment usage, etc. Since its authorization in 2005, ORA has received \$2,853,664 from NPS under the Heritage Partnership Program while also receiving \$6,517,402 in matching and leveraged funds. The total funds are composed of \$2.6 million in non-NPS Federal sources, \$2.6 million in Private/Other (e.g., multiple charitable trusts, Petroleum History Institute, and various corporate donations), and the remainder coming from a variety of sources including state and local (e.g., DCNR).

There are several events to note in the revenue streams detailed in Table 4.3. For example, there was a large Federal grant totaling \$1.2 million in 2013 which was for the McClintock Trail South. In addition, OIL 150 donors also included multiple oil/gas industry companies and their respective foundations which occurred in 2008-2010. Also, in 2012, there were large Private/Other funds included grants from multiple

trusts for several phases of the rehabilitation of the Tarbell House, as well as higher than usual revenues from book sales and events.

Leveraged funds totaled \$11,702,702 from 2005-2015 (Table 4.2). This amount represents funding and revenue from a variety of sources, including State and local revenue, Private and other donations, and other Federal funds. In addition, there was approximately \$6 million in resources and expenses that were part of the larger ORA and intertwined with the ORNHA mission. Examples of these sources are given and discussed in more detail above. We see a consistent amount of leveraged funds throughout the operation. Note that there are additional resources and revenue that are brought to bear for NHA-related activities but that are part of the larger ORA organization (discussed in more detail below). The drastic increase in leveraged funds in 2009 is indicative of OIL 150 projects and donors. We also see a higher level of leveraged funds in 2010 through 2013, which coincided with additional OIL 150 donors and projects as well as major improvements at scenic overlooks and phases of bike trail development.

**Table 4.3 ORNHA Other Federal Funding**

Funding	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Total
PennDOT (Federal Funding, Murray's Scenic View)	–	–	–	–	–	\$34,135	\$58,863	–	–	–	–	\$92,998
PennDOT (Federal Funding, McClintock Trail South)	–	–	–	–	–	–	–	\$20,765	\$1,131,184	\$49,340	–	\$1,201,289
Appalachian Regional Commission (Rts. 8 & 62 Corridor Study)	–	\$904	–	–	–	–	–	–	–	–	–	\$904
Appalachian Regional Commission (OIL 150)	–	–	\$15,000	–	–	–	–	–	–	–	–	\$15,000
Department of Agriculture (Forest Service, Allegheny Region Tourism)	–	–	\$58,889	\$43,881	\$13,887	\$86,154	\$31,389	–	–	–	–	\$234,200
Department of Agriculture (Rural Development, Venango Co. RLF)	–	–	–	–	\$65,000	\$18,000	–	–	–	–	–	\$83,000
Department of Energy (OIL 150 Posters)	–	–	–	–	\$24,000	–	–	–	–	–	–	\$24,000
Department of Labor (Rural Technical Education)	\$29,583	\$101,444	–	–	–	–	–	–	–	–	–	\$131,027
Health and Human Services (HRSA, Congress. Mandated Telehealth)	\$186,104	\$3,129	\$128,040	\$31,446	–	–	–	–	–	–	–	\$348,718
Small Business Administration (Congress. Mandated Award)	\$51,113	\$31,567	–	–	–	–	–	–	–	–	–	\$82,680
Small Business Administration (Congress. Mandated Award)	–	–	–	\$8,410	\$66,150	\$46,090	\$43,160	–	–	–	–	\$163,810
Small Business Administration (Congress. Mandated Award)	–	–	–	–	–	–	\$2,120	\$81,982	\$81,511	\$34,387	–	\$200,000
<b>Total</b>	<b>\$266,800</b>	<b>\$137,043</b>	<b>\$201,929</b>	<b>\$83,737</b>	<b>\$169,037</b>	<b>\$184,379</b>	<b>\$135,532</b>	<b>\$102,747</b>	<b>\$1,212,695</b>	<b>\$83,727</b>		<b>\$2,577,625</b>

Note: Figures above are entirely from unaudited documents supplied by ORA.

By congressional mandate noted above, the ORNHA must not have its NPS contribution exceed 50 percent of total expenditures. The expectation is that ORA will leverage its Federal assistance funds to secure additional funding that supports its mission. Table 4.4 presents the federal NPS funds (via the Heritage Partnership Program), the non-federal funds received by ORA, and the match ratio by year. The table shows that, overall, **ORNHA has met its match requirements, with the NPS contribution being less than 50 percent of total expenditures for all years.** Note that this does not include larger ORA resources which are discussed in more detail below. The additional revenue would have reduced the match ratio even more. We have no record of what the non-federal revenue was for that year. This demonstrates a strong record of finding alternative sources of revenue beyond what is required by the Congressional mandate. It is also a theme we heard throughout interviews with staff and board members about the ability of the ORNHA to leverage very effectively (activities described in Section 3).

**Table 4.4 ORNHA NPS and Matched Funds by Year**

Year	NPS Funds Expended	Matched NPS Funds	Total	Match Ratio
2005	\$923	\$155,000	\$155,923	Y
2006	\$94,009	\$201,000	\$295,009	Y
2007	\$158,311	\$171,000	\$329,311	Y
2008	\$239,555	\$390,717	\$630,272	Y
2009	\$332,818	\$1,503,758	\$1,836,576	Y
2010	\$188,807	\$1,054,138	\$1,242,945	Y
2011	\$409,810	\$917,057	\$1,326,867	Y
2012	\$357,095	\$1,156,511	\$1,513,606	Y
2013	\$306,866	\$306,865	\$613,731	Y
2014	\$203,273	\$331,233	\$534,506	Y
2015	\$311,414	\$330,123	\$641,537	Y
<b>Total</b>	<b>\$2,602,881</b>	<b>\$6,517,402</b>	<b>\$9,120,283</b>	

From 2005-2015, the ORNHA received just over \$2.8 million in NPS Heritage Partnership Fund revenue, \$2.6 million in other federal revenue, \$2.6 million in Private/Other donations, and \$3.8 million in State and local revenue including PA DCNR grants as a Pennsylvania Heritage Area, grants from multiple local charitable trusts, grants from municipalities, and revenue from sale of books.

## 4.2 Use of Financial Resources

ORA uses funding provided by the NPS to support operational expenses including salary and administration funds, as well as programmatic activities. Since 2005, of the \$23.7 million total dollars available to ORA, 12 percent or \$2.8 million were direct from NPS federally allocated Heritage Partnership Program funds and 26 percent or \$6.5 million, were non-Federal funds and external matching contributions. In addition, ORA also expended additional resources that are not officially on the audited financial statements because the money flowed through the larger ORA outside of NHA, but were intertwined with NHA operations and jointly expended toward the same goals (see below).

## Programmatic and Operational Expenditures

ORA's expenditures per year are displayed in Table 4.5. Operational expenses include employee related expenses, administrative expenses, outside services, insurance, project management and construction, repair and maintenance, utilities, salaries, rent, and general marketing. Operational expenses of ORA ranged from \$243,875 in 2015 to a high of \$561,413 in 2007. The higher amounts are related to increased numbers of employees and economic development contractual obligations. Most years were between \$260,000 and \$490,000. In total, ORA has spent approximately \$4.2 million in operational expenses.

Programmatic expenses are those resources dedicated to ORNHA activities, such as heritage development, economic development, tourism destination and marketing, and property management. Program expenses throughout the years have fluctuated, reaching their lowest in 2014 at \$811,256 due to fewer and smaller construction phases. In contrast, the highest programmatic expense years were 2008 and 2009 with approximately \$2.7 million and \$2.4 million, respectively. Those years saw increased programmatic spending due to increased numbers of employees and economic development contractual obligations. Table 4.5 shows the direct total spent on programmatic expenses (NPS and matched funds) as \$19,518,281. Note that these numbers are based on tables provided by ORA and were not developed from audited financial statements.

**Table 4.5 ORA Operational and Program Expenses by Year**

Year	Operational Expenses	Program Expenses	Total
2005	\$361,500	\$1,523,982	\$1,885,482
2006	\$451,488	\$1,694,997	\$2,146,485
2007	\$561,413	\$1,607,281	\$2,168,694
2008	\$542,153	\$2,706,335	\$3,248,488
2009	\$285,038	\$2,425,261	\$2,710,299
2010	\$459,260	\$2,168,870	\$2,628,130
2011	\$488,319	\$1,714,503	\$2,202,822
2012	\$279,135	\$1,874,101	\$2,153,236
2013	\$297,495	\$1,979,907	\$2,277,402
2014	\$260,760	\$811,256	\$1,072,016
2015	\$243,875	\$1,011,788	\$1,255,663
<b>Total</b>	<b>\$4,230,436</b>	<b>\$19,518,281</b>	<b>\$23,748,717</b>

Tables 4.6 and 4.7, and Figures 4.1 and 4.2 provide details of the programmatic expenditures by strategy/activity area for 2005-2015 based on ORA's financial statements and supplemental tables provided. Figure 4.1 shows that the largest expenditures occurred in the areas of Heritage Development (35.3%) and Economic Development (34.5%). Investments in these areas were much greater than other areas for most years. Some of the Heritage Development activities financed and performed during the time included improvements at Drake Well, OIL 150 celebration, the Tarbell house renovation, brownfield development, trail work and waterfront landing renovations, and the Neilltown Church renovation. Several examples of Economic Development included Trail Entrepreneur Business Plan contest, development of industrial parks (e.g., Sandycreek and Barkeyville), and the Oil City Main Street Program.

After Heritage Development and Economic Development, the remaining areas in order of expenditures were: a) Property Management (20.1%), and b) Tourism Destination Marketing (10.2%). Property management activities include managing such properties as the Crawford Center Building in Emlenton, Barkeyville Industrial Park, Sandycreek Industrial Park, and the apartment building called Allegheny Overlook in Oil City. Activities related to Tourism Destination Marketing included the NW PA Fishing report (done in collaboration with the Pennsylvania Great Lakes Region), multi-day visits with tour operators and bus companies from a range of states in and out of the region, display booths at trade shows, festivals and tournaments, and the widely distributed Visitor Guide.

Table 4.6 presents ORA's total program expenditures across years by specific program activity. The amount spent from 2005-2015 on programmatic activities is approximately \$19.5 million.

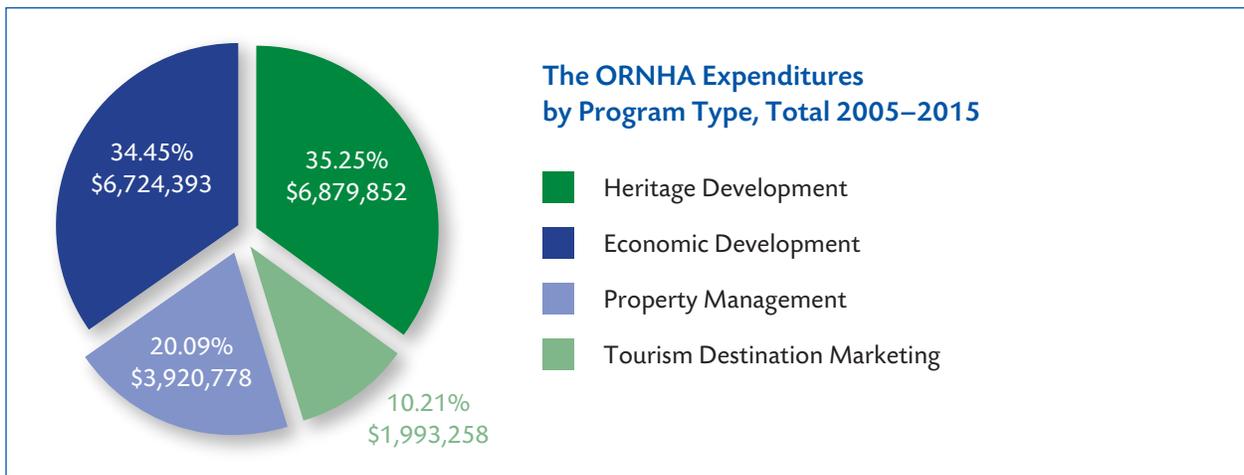
**Table 4.6 ORA Program Expenses by Activity and Year**

TABLE PROVIDED BY ORA

Year	Heritage Development	Economic Development	Tourism Destination Marketing	Property Management	Total
2005	\$516,924	\$412,498	\$224,191	\$370,369	\$1,523,982
2006	\$436,360	\$618,787	\$232,620	\$407,230	\$1,694,997
2007	\$466,595	\$440,426	\$285,175	\$415,085	\$1,607,281
2008	\$778,976	\$1,147,953	\$184,170	\$595,236	\$2,706,335
2009	\$743,727	\$906,322	\$212,416	\$562,796	\$2,425,261
2010	\$589,162	\$1,052,250	\$179,022	\$348,436	\$2,168,870
2011	\$403,177	\$900,279	\$159,802	\$251,245	\$1,714,503
2012	\$811,969	\$503,530	\$140,595	\$418,008	\$1,874,101
2013	\$1,127,774	\$504,151	\$132,170	\$215,813	\$1,979,907
2014	\$451,090	\$118,893	\$121,595	\$119,678	\$811,256
2015	\$554,099	\$119,304	\$121,503	\$216,882	\$1,011,788
<b>Subtotal</b>	<b>\$6,879,852</b>	<b>\$6,724,393</b>	<b>\$1,993,258</b>	<b>\$3,920,778</b>	<b>\$19,518,281</b>

Table source: Totals are supported by financial documents—but the specific program expenses are not. Totals may not add due to rounding.

**Figure 4.1 The ORA Expenditures by Program Type, Total 2005–2015**



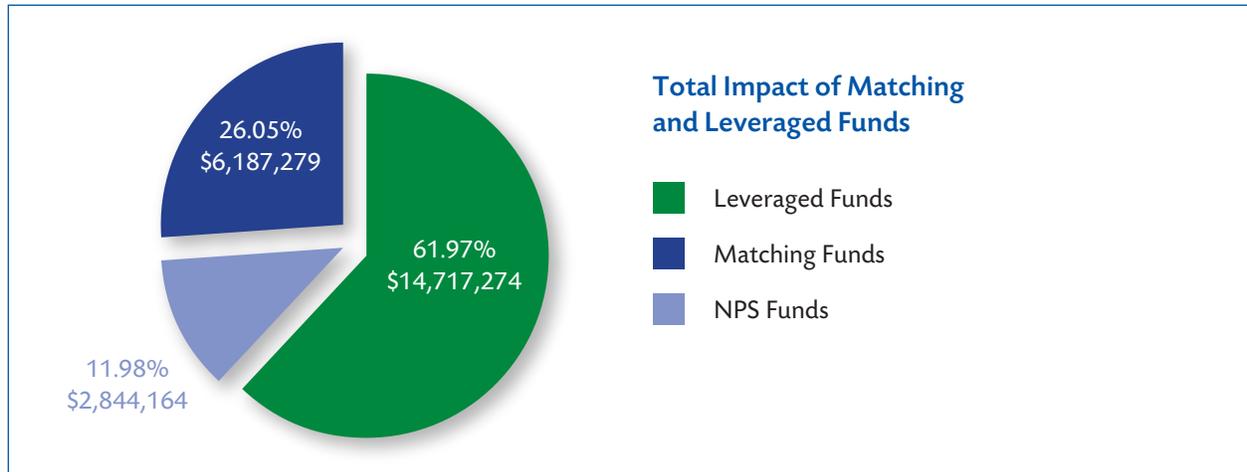
**Table 4.7 The ORA Programmatic Spending by Activity, Total 2005–2015**

Activity	Dollar Total	Percentage
Heritage Development	\$6,879,852	35.25%
Economic Development	\$6,724,393	34.45%
Tourism Destination Marketing	\$1,993,258	10.21%
Property Management	\$3,920,778	20.09%
<b>Total</b>	<b>\$19,518,281</b>	<b>100.0%</b>

### 4.3 Impact of Investments

The evaluation assessed the investments made by ORA and found that they generally aligned with the core mission and goals. Expenditures were in keeping with the core areas of Capital Construction, Operate and Manage, Conservation/Restoration/Preservation, and Events Management throughout the period. ORA has a strong record that successfully indicates NPS contributions not having exceeded 50 percent of total expenditures for all years, as shown in the financial tables. In addition, ORA has a long record of leveraging NPS funds to bring in additional contributions from a variety of Federal and non-Federal sources.

**Figure 4.2 The ORA Impact of Matching and Leveraged Funds, Total 2005–2015**



## Section 5 – NHA Sustainability

### 5.1 Defining Sustainability

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

“...the National Heritage Area coordinating entity’s continuing ability to work collaboratively and reciprocally with federal, state, community, and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation and economic development of nationally significant resources.” Critical components of sustainability for a NHA include, but are not limited to:

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

Additionally, the Sustainability Plan (completed in December 2015) highlights ORA’s future paths for sustainability:

- Educational Travel and VolunTourism
- Outdoor Recreational Travel and Tourism
- Entrepreneurial Initiatives
- Brownfield and Community Redevelopment Initiative

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

### 5.2 Honoring the Legislative Mandate of the NHA

As stated in the authorizing legislation (P.L. 108-477), the purpose of the Oil Region National Heritage Area (ORNHA) is:

- To enhance a cooperative management framework to assist the Commonwealth of Pennsylvania, its units of local government, and area citizens in conserving, enhancing, and interpreting the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic development for the benefit and inspiration of present and future generations in the Commonwealth of Pennsylvania and the United States.

### 5.3 ORNHA’s Management Capacity

#### 5.3.1 Governance, Leadership, and Oversight

##### Board Members

According to the Oil Region National Heritage Area Act of 2004, (Public Law 108-447) by the 108th Congress) the management entity for this Oil Region is the Oil Region Alliance of Business, Industry, and

Tourism (ORA), a 501(c)3 organization composed of ORA board of directors and staff. The board has evolved over time. According to stakeholder interviews, when the original four agencies merged to form ORA, the new board was composed of the combined members of the original agencies' boards of directors. Respondents report that the operations of the board remained separated by activity type until the focus shifted to integrating project scopes across activity types. According to ORA's most recent bylaws, the board will comprise a "maximum of 19 members, as follows: Up to 13 directors shall be elected by the membership and the Board may appoint up to six members." The bylaws describe the election process to the board as follows:

1. Candidates shall be elected by a ballot vote of the membership at the annual meeting of the Alliance for a term of 3 years.
2. Beginning with the first annual meeting of the Alliance membership, one-third of elected board seats will be elected each year.
3. Appointed directors shall serve on the Board as prescribed by ... these Bylaws.
4. No elected directors may serve more than 6 consecutive years.
5. All members shall be eligible to vote for all candidates nominated for election to the Board of Directors, and the eligible candidates receiving the highest number of votes cast for the open positions shall be elected to the Board of Directors.
6. No proxies shall be allowed.
7. Members shall be limited to one vote for each open seat.
8. Cumulative voting shall not be permitted.
9. Appointed directors shall serve on the Board for a term of 1 year, as prescribed by ... these Bylaws.

The bylaws stipulate an annual meeting to be held in September for all members. According to this legislation, members must have 10 days of notice before the meeting. The board of directors must hold a meeting immediately following the general meeting to address any emerging business. Then the board will meet regularly as stated by the chair.

Currently the board meets monthly at Klapec's Auto Body conference room in Cranberry, PA, and the annual meeting is held at a larger location which varies by year.

John Phillips, II, President/CEO currently presides over the Board of Directors. Board meetings cover a diverse set of issues. For example, we attended the March board meeting that included a report from the president (John Phillips, II), the financial report from February, and updates from the Economic Development, Heritage Advisory, Property & Asset, and Tourism Promotion councils.

Stakeholder interviews suggested that elections to the board strive to maintain representation across geography, activity area, and experience. Additionally, before serving on the board, people interested in becoming board members are directed to one of the advisory committees to gain experience and familiarity with the activities of ORA. Some interviewees suggested that the board is currently strong because it does not consist of a group of people who simply agree to any agenda items. These stakeholders suggested that this problem existed in previous boards and that the current board has acted intentionally to encourage active discussion around proposed business.

Interviewees consistently praised the Board of Directors and the leadership of the President/CEO. They noted that the current president/CEO leadership style and approach was an improvement over the past structure and was a large part of the successful transition and evolution of ORA. In addition, there was consistent praise for the Vice President of Heritage Development. Interviewees regularly noted the high level of dedication for heritage activities, networking capabilities, and encyclopedic knowledge of the region and its heritage. The only sustainability issue that arose from stakeholder interviews was the concern that the VP of Heritage Development will eventually retire. According to interviewees, replacing the VP of Heritage Development with someone that shares this dedication for the ORNHA and knowledge of the region will be incredibly challenging.

**Table 5.1 Board Committees/Task Forces Structure**

Committee/Task Force	Responsibility
Nominating Committee	There shall be a Nominating Committee for the purpose of selecting candidates for seats on the Board of Directors and performing such other functions as are assigned to them by the Board of Directors. Persons wishing to be candidates for seats on the Board of Directors must be members in good standing and shall submit their names to the Nominating Committee for consideration. The Nominating Committee shall make a written report to the Chair at the January Board meeting.
Personnel Committee	The Personnel Committee shall consist of the Chair and up to four other directors appointed by the chair. The Personnel Committee shall work with the President on matters regarding organizational structure and personnel policies.
Executive Committee	The Executive Committee shall consist of the Chair, Vice Chair, Secretary, Treasurer, Assistant Secretary/Treasurer and up to two other directors appointed by the Chair. The Executive Committee shall carry on the business of the Alliance in the interim between meetings of the Board of Directors and shall also carry out other such duties, as the Board of Directors shall, from time to time, specify. All official action taken by the Executive Committee under this section shall be considered by the Board of Directors for ratification at the next regular meeting of the Board following such Executive Committee action.

### 5.3.2 Staffing and Operations

The current staff housed at ORA consists of nine full-time employees: eight that work directly for ORA and one that manages the Oil City Main Street program. In addition to the President/CEO, there is an executive VP/COO who oversees the programs and financials of the organization. Both executives have been involved with ORA since the merger in 2005, but the President/CEO stepped into his current role in 2011. Under the executives, there are two Vice presidents (Heritage and Economic Development, respectively) and three managers. Additionally, ORA has an office administrator who handles day-to-day operations such as coordinating meetings. Over the years, the total number of staff members has decreased from 21 people divided into distinct departments based on activity type to the current staff of nine with a much more flattened hierarchy and stronger emphasis to integrating activity areas within projects and programs.

Based on interviews with the staff, the core staff has a good working relationship with the board. Additionally, they are active on committees and the VPs attend board meetings. According to interviews, since the staff work actively with the Board of Directors, there is no need for an official process for relaying information between ORA and its Board. Staff interviewees suggested that the role of the ORNHA within ORA has shifted over time. Currently the direction is moving toward ORA focusing mostly on managing the ORNHA, with additional foci on additional projects related to economic development and tourism destination marketing.

### 5.3.3 Strategic Planning and Adaptive Management

ORA and its board participate in a variety of planning and adaptive management strategies. Such strategies include encouraging collaboration across local community groups, governments, and consulting management groups to create strategic plans. Strategic plans include the original and updated management action plans, a strategic business plan from 2010-2015, programs of work, annual reports, a number of feasibility assessments, and, most recently, the sustainability plan, published in December 2015. The large number of planning documents suggests that ORA leadership values the importance of strategic planning and adaptive management.

Strategic plans such as the recent sustainability plan provide specific recommendations to guide the future path of NHA activities. As mentioned in the opening of the current section, the sustainability plan recommended activities aligned with: Educational Travel and VolunTourism, Outdoor Recreational Travel and Tourism, Entrepreneurial Initiatives, and Brownfield and Community Redevelopment Initiatives. The plan makes these recommendations by revisiting previous strategic plans (e.g., the management action plan update in 2006) and renewing ORA's focus on its original goals, adapted for modern visitors to the ORNHA.

### 5.3.4 Monitoring and Recordkeeping

As pointed out in Section 4, the financial records for Federal funding that ORA provided to NPS could not be independently verified with official documents. While ORA was able to provide specific financial figures as required for the evaluation, neither the official tax documents nor other official audits distinguish NPS (or other Federal agency) funding in a way that allows ORA's figures to be verified in a systematic way, consistent with the evaluation guide. Accordingly, future audits and official financial documents should include greater detail (e.g., Federal revenue by each source by year, revenue and expenses within more activity areas tracked over the course of fiscal years) so that revenues and expenditures can be verified in future evaluations.

Despite the challenges with financial documentation, ORA tracks other types of information from visitors to the ORNHA. For example, ORA partners track visitation to trails and have shown that over 150,000 people used the trails in 2013. Additionally, respondents reported that ORA collects survey data from attendants of particular events. ORA surveyed 513 people and found that 26 percent of the participants visit the ORNH overnight and 36 percent of the visitors were traveling with children under 18 years old. ORA together with volunteers survey passengers on the Oil Creek & Titusville Railroad to better understand who is visiting the ORNHA. Interviewees supported the idea of collecting outcome data in line with the short- and long-term outcomes included in the logic model. The current evaluation encourages ORA to move forward with collecting and understanding those data in the future.

### 5.4 Partnerships

In Section 2, we provide detailed lists of the partnerships that are central to the operation of the Oil Region. Such partnerships include NPS, private organizations, community organizations, tourism organizations, as well as state, federal, and local government agencies.

From interviews with stakeholders, it is evident that ORA both provides and receives benefits from their partners. Partners reported multiple benefits from their relationship with ORA such as seed funds for projects, connections to other organizations in their communities, and a sense that they were contributing to the story of the Oil Region rather than just to the stories of their hometowns. For example, one organization in Emlenton reported that their site saw a boost in visitors after it successfully built a visitor center with ORA. Further, the site expanded their building's occupancy to include local businesses such as a second hand clothing store. This example clearly shows the reciprocal nature of ORA's partnerships – the partner benefits from initial and ongoing support, while the ORNHA benefits from marketing material distribution at the visitor's center.

The sustainability plan lays out a number of concrete steps that detail how ORA should support partners in the future. First, ORA could increase opportunities for funding by broadening the membership of their board, advisory committees, and involvement in other organizations' boards. ORA could identify localities with fewer activities compared to the rest of the ORNHA (e.g., Titusville) and attempt to reach out to individuals who might become more involved with the NHA. Second, the sustainability report states that ORA could broaden the themes of focus. The report suggests that ORA could link its stories better to those of surrounding Heritage Areas. Additional recommendations for sustainable partnerships include expanding the "Main Street" approach to other programs, continuing the business plan contest, building a more structured network for volunteers, and focusing on preservation partnerships such as those with realtors.

## **5.5 Financial Sustainability, the Importance of NPS Funds, and the Importance of NHA Designation**

### **5.5.1 ORA Need for Financial Resources**

The Oil Region Alliance is supported by a variety of Federal, state, and local funding sources (as shown in Section 4). If NPS funds were not available to support ORA, activities within the ORNHA would likely continue, albeit at a much reduced scale. Activities that are mostly funded through non-NPS funding (i.e., many economic development and tourism destination marketing activities) would likely continue, but heritage development activities would be limited. Interviewees suggested that a sunset of NPS funding would lead to a strong decline in the numbers and scope of heritage development activities and of leveraging across all activity types.

### **5.5.2 ORNHA Need for Financial Resources**

Interviewees almost unanimously suggested that the heritage development activities would be sharply diminished if NPS funding disappeared. Responses to questions about sunset of NPS funding varied from "crippling" to "limited change," with most respondents believing the absence of NPS funds would be a great challenge to activities within the ORNHA. Further, stakeholders suggested that the elimination of NPS funding would minimize the amount of flexible funds that ORA currently uses to leverage other funds.

Respondents also noted the vital role that the NHA designation plays in progress within the ORNHA. For example, multiple respondents stated that the designation provides ORA staff with a strong voice in state- and Federal-level conversations. Interviewees suggested that the reputation that comes from NHA designation is vital to large-scale projects and programs; the designation only strengthens the capacity of ORA to manage activities within the ORNHA. Further, the economic development successes of activities within the ORNHA could be used as a model for other NHAs. In the sense that NHAs can share successes and highlight NPS' role in those successes, the NHA designation benefits both the ORNHA and NPS.

Table 5.2 shows that ORA has successfully matched funds for its operation from the time it was created to the present.

**Table 5.2 Matched Funds**

Year	NPS Funds Expended	Matched NPS Funds	Total	Match Ratio
2005	\$923	\$155,000	\$155,923	Y
2006	\$94,009	\$201,000	\$295,009	Y
2007	\$158,311	\$171,000	\$329,311	Y
2008	\$239,555	\$390,717	\$630,272	Y
2009	\$332,818	\$1,503,758	\$1,836,576	Y
2010	\$188,807	\$1,054,138	\$1,242,945	Y
2011	\$409,810	\$917,057	\$1,326,867	Y
2012	\$357,095	\$1,156,511	\$1,513,606	Y
2013	\$306,866	\$306,865	\$613,731	Y
2014	\$203,273	\$331,233	\$534,506	Y
2015	\$311,414	\$330,123	\$641,537	Y
<b>Total</b>	<b>\$2,602,881</b>	<b>\$6,517,402</b>	<b>\$9,120,283</b>	

## 5.6 Sustainability Summary

This section of the document described and assessed how ORA's management, leadership, and relationships with NPS and other stakeholder organizations contributed to the development and sustainability of ORNHA. ORA has demonstrated a capacity for overseeing operations as an indicator of sustainability not only through strong leadership, but also through its modes of monitoring visitors and long history with

key partners. ORA has proactively commissioned a sustainability plan (published in December 2015) that illuminates potential paths for future activities. If NPS funding were to disappear, the activities within the ORNHA would likely be diminished. With continued support from NPS and a clear plan for sustainability, the board and additional leadership are poised to continue successfully working toward meeting the NHA's stated goals.

## Appendix 1 – Authorizing Legislation

Excerpt(s) from Public Law 108–447  
108th Congress

108th CONGRESS  
PUBLIC LAW 108–447–DEC. 8, 2004

TITLE VI—OIL REGION NATIONAL  
HERITAGE AREA

SEC. 601. SHORT TITLE; DEFINITIONS.

(a) SHORT TITLE.—This title may be cited as the “Oil Region National Heritage Area Act”.

(b) DEFINITIONS.—For the purposes of this title, the following definitions shall apply:

(1) HERITAGE AREA.—The term “Heritage Area” means the Oil Region National Heritage Area established in section 603(a).

(2) MANAGEMENT ENTITY.—The term “management entity” means the Oil Heritage Region, Inc., or its successor entity.

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

SEC. 602. FINDINGS AND PURPOSE.

(a) FINDINGS.—The Congress finds the following:

(1) The Oil Region of Northwestern Pennsylvania, with numerous sites and districts listed on the National Register of Historic Places, and designated by the Governor of Pennsylvania as one of the State Heritage Park Areas, is a region with tremendous physical and natural resources and possesses a story of State, national, and international significance.

(2) The single event of Colonel Edwin Drake’s drilling of the world’s first successful oil well in 1859 has affected the industrial, natural, social, and political structures of the modern world.

(3) Six national historic districts are located within the State Heritage Park boundary, in Emlenton, Franklin, Oil City, and Titusville, as well as 17 separate National Register sites.

(4) The Allegheny River, which was designated as a component of the national wild and scenic rivers system in 1992 by Public Law 102–271, traverses the Oil Region and connects several of its major sites, as do some of the river’s tributaries such as Oil Creek, French Creek, and Sandy Creek.

(5) The unspoiled rural character of the Oil Region provides many natural and recreational resources, scenic vistas, and excellent water quality for people throughout the United States to enjoy.

(6) Remnants of the oil industry, visible on the landscape to this day, provide a direct link to the past for visitors, as do the historic valley settlements, riverbed settlements, plateau developments, farmlands, and industrial landscapes.

(7) The Oil Region also represents a cross section of American history associated with Native Americans, frontier settlements, the French and Indian War, African Americans and the Underground Railroad, and immigration of Swedish and Polish individuals, among others.

(8) Involvement by the Federal Government shall serve to enhance the efforts of the Commonwealth of Pennsylvania, volunteer organizations, and private businesses, to promote the cultural, natural, and recreational resources of the region in order to fulfill their full potential.

(b) PURPOSE.—The purpose of this title is to enhance a cooperative management framework to assist the Commonwealth of Pennsylvania, its units of local government, and area citizens in conserving, enhancing, and interpreting the significant features of the lands, water, and structures of the Oil Region, in a manner consistent with compatible economic development for the benefit and inspiration of present and future generations in the Commonwealth of Pennsylvania and the United States.

#### SEC. 603. OIL REGION NATIONAL HERITAGE AREA.

(a) ESTABLISHMENT.—There is hereby established the Oil Region National Heritage Area.

(b) BOUNDARIES.—The boundaries of the Heritage Area shall include all of those lands depicted on a map entitled “Oil Region National Heritage Area”, numbered OIRE/20,000 and dated October 2000. The map shall be on file in the appropriate offices of the National Park Service. The Secretary of the Interior shall publish in the Federal Register, as soon as practical after the date of the enactment of this Act, a detailed description and map of the boundaries established under this subsection.

(c) MANAGEMENT ENTITY.—The management entity for the Heritage Area shall be the Oil Heritage Region, Inc., the locally based private, nonprofit management corporation which shall oversee the development of a management plan in accordance with section 605(b).

#### SEC. 604. COMPACT.

To carry out the purposes of this title, the Secretary shall enter into a compact with the management entity. The compact shall include information relating

to the objectives and management of the area, including a discussion of the goals and objectives of the Heritage Area, including an explanation of the proposed approach to conservation and interpretation and a general outline of the protection measures committed to by the Secretary and management entity.

#### SEC. 605. AUTHORITIES AND DUTIES OF MANAGEMENT ENTITY.

(a) AUTHORITIES OF THE MANAGEMENT ENTITY.—The management entity may use funds made available under this title for purposes of preparing, updating, and implementing the management plan developed under subsection (b). Such purposes may include—

- (1) making grants to, and entering into cooperative agreements with, States and their political subdivisions, private organizations, or any other person;
- (2) hiring and compensating staff; and
- (3) undertaking initiatives that advance the purposes of the Heritage Area.

(b) MANAGEMENT PLAN.—The management entity shall develop a management plan for the Heritage Area that—

- (1) presents comprehensive strategies and recommendations for conservation, funding, management, and development of the Heritage Area;
- (2) takes into consideration existing State, county, and local plans and involves residents, public agencies, and private organizations working in the Heritage Area;
- (3) includes a description of actions that units of government and private organizations have agreed to take to protect the resources of the Heritage Area;

(4) specifies the existing and potential sources of funding to protect, manage, and develop the Heritage Area;

(5) includes an inventory of the resources contained in the Heritage Area, including a list of any property in the Heritage Area that is related to the themes of the Heritage Area and that should be preserved, restored, managed, developed, or maintained because of its natural, cultural, historic, recreational, or scenic significance;

(6) describes a program for implementation of the management plan by the management entity, including plans for restoration and construction, and specific commitments for that implementation that have been made by the management entity and any other persons for the first 5 years of implementation;

(7) lists any revisions to the boundaries of the Heritage Area proposed by the management entity and requested by the affected local government; and

(8) includes an interpretation plan for the Heritage Area.

(c) DEADLINE; TERMINATION OF FUNDING.—

(1) DEADLINE.—The management entity shall submit the management plan to the Secretary within 2 years after the funds are made available for this title.

(2) TERMINATION OF FUNDING.—If a management plan is not submitted to the Secretary in accordance with this subsection, the management entity shall not qualify for Federal assistance under this title.

(d) DUTIES OF MANAGEMENT ENTITY.—The management entity shall—

(1) give priority to implementing actions set forth in the compact and management plan;

(2) assist units of government, regional planning organizations, and nonprofit organizations in—

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

(B) developing recreational resources in the Heritage Area;

(C) increasing public awareness of and appreciation for the natural, historical, and architectural resources and sites in the Heritage Area;

(D) the restoration of any historic building relating to the themes of the Heritage Area;

(E) ensuring that clear signs identifying access points and sites of interest are put in place throughout the Heritage Area; and

(F) carrying out other actions that the management entity determines to be advisable to fulfill the purposes of this title;

(3) encourage by appropriate means economic viability in the Heritage Area consistent with the goals of the management plan;

(4) consider the interests of diverse governmental, business, and nonprofit groups within the Heritage Area; and

(5) for any year in which Federal funds have been provided to implement the management plan under subsection (b)—

(A) conduct public meetings at least annually regarding the implementation of the management plan;

(B) submit an annual report to the Secretary setting forth accomplishments, expenses and income, and each person to which any grant was made by the management entity in the year for which the report is made; and

(C) require, for all agreements entered into by the management entity authorizing expenditure of Federal funds by any other person, that the person making the expenditure make available to the management entity for audit all records pertaining to the expenditure of such funds.

(e) PROHIBITION ON THE ACQUISITION OF REAL PROPERTY.— The management entity may not use Federal funds received under this title to acquire real property or an interest in real property.

SEC. 606. DUTIES AND AUTHORITIES OF THE SECRETARY.

(a) TECHNICAL AND FINANCIAL ASSISTANCE.—

(1) IN GENERAL.—

(A) OVERALL ASSISTANCE.—The Secretary may, upon the request of the management entity, and subject to the availability of appropriations, provide technical and financial assistance to the management entity to carry out its duties under this title, including updating and implementing a management plan that is submitted under section 605(b) and approved by the Secretary and, prior to such approval, providing assistance for initiatives.

(B) OTHER ASSISTANCE.—If the Secretary has the resources available to provide technical assistance to the management entity to carry out its duties under this title (including updating and implementing a management plan that is submitted under section 605(b) and approved by the Secretary and, prior to such approval, providing assistance for initiatives), upon the request of the management entity the Secretary shall provide such assistance on a reimbursable basis. This subparagraph does not preclude the Secretary from providing nonreimbursable assistance under subparagraph (A).

(2) PRIORITY.—In assisting the management entity, the Secretary shall give priority to actions that assist in the—

(A) implementation of the management plan;

(B) provision of educational assistance and advice regarding land and water management techniques to conserve the significant natural resources of the region;

(C) development and application of techniques promoting the preservation of cultural and historic properties;

(D) preservation, restoration, and reuse of publicly and privately owned historic buildings;

(E) design and fabrication of a wide range of interpretive materials based on the management plan, including guide brochures, visitor displays, audio-visual and interactive exhibits, and educational curriculum materials for public education; and

(F) implementation of initiatives prior to approval of the management plan.

(3) DOCUMENTATION OF STRUCTURES.—

The Secretary, acting through the Historic American Building Survey and the Historic American Engineering Record, shall conduct studies necessary to document the industrial, engineering, building, and architectural history of the Heritage Area.

(b) APPROVAL AND DISAPPROVAL OF MANAGEMENT PLANS.—The Secretary, in consultation with the Governor of Pennsylvania, shall approve or disapprove a management plan submitted under this title not later than 90 days after receiving such plan. In approving the plan, the Secretary shall take into consideration the following criteria:

(1) The extent to which the management plan adequately preserves and protects the natural, cultural, and historical resources of the Heritage Area.

(2) The level of public participation in the development of the management plan.

(3) The extent to which the board of directors of the management entity is representative of the local government and a wide range of interested organizations and citizens.

(c) ACTION FOLLOWING DISAPPROVAL.—If the Secretary disapproves a management plan, the Secretary shall advise the management entity in writing of the reasons for the disapproval and shall make recommendations for revisions in the management plan. The Secretary shall approve or disapprove a proposed revision within 90 days after the date it is submitted.

(d) APPROVING CHANGES.—The Secretary shall review and approve amendments to the management plan under section 605(b) that make substantial changes. Funds appropriated under this title may not be expended to implement such changes until the Secretary approves the amendments.

(e) EFFECT OF INACTION.—If the Secretary does not approve or disapprove a management plan, revision, or change within 90 days after it is submitted to the Secretary, then such management plan, revision, or change shall be deemed to have been approved by the Secretary.

#### SEC. 607. DUTIES OF OTHER FEDERAL ENTITIES.

Any Federal entity conducting or supporting activities directly affecting the Heritage Area shall—

(1) consult with the Secretary and the management entity with respect to such activities;

(2) cooperate with the Secretary and the management entity in carrying out their duties under this title and, to the maximum extent practicable, coordinate such activities with the carrying out of such duties; and

(3) to the maximum extent practicable, conduct or support such activities in a manner that the management entity determines shall not have an adverse effect on the Heritage Area.

#### SEC. 608. SUNSET.

The Secretary may not make any grant or provide any assistance under this title after the expiration of the 15-year period beginning on the date that funds are first made available for this title.

#### SEC. 609. REQUIREMENTS FOR INCLUSION OF PRIVATE PROPERTY.

(a) NOTIFICATION AND CONSENT OF PROPERTY OWNERS REQUIRED.—No privately owned property shall be preserved, conserved, or promoted by the management plan for the Heritage Area until the owner of that private property has been notified in writing by the management entity and has given written consent for such preservation, conservation, or promotion to the management entity.

(b) LANDOWNER WITHDRAW.—Any owner of private property included within the boundary of the Heritage Area shall have their property immediately removed from the boundary by submitting a written request to the management entity.

#### SEC. 610. PRIVATE PROPERTY PROTECTION.

(a) ACCESS TO PRIVATE PROPERTY.—Nothing in this title shall be construed to—

(1) require any private property owner to allow public access (including Federal, State, or local government access) to such private property; or

(2) modify any provision of Federal, State, or local law with regard to public access to or use of private property.

(b) LIABILITY.—Designation of the Heritage Area shall not be considered to create any liability, or to have any effect on any liability under any other law, of any private property owner with respect to any persons injured on such private property.

(c) RECOGNITION OF AUTHORITY TO CONTROL LAND USE.—Nothing in this title shall be construed to modify the authority of Federal, State, or local governments to regulate land use.

(d) PARTICIPATION OF PRIVATE PROPERTY OWNERS IN HERITAGE AREA.—Nothing in this title shall be construed to require the owner of any private property located within the boundaries of the Heritage Area to participate in or be associated with the Heritage Area.

(e) EFFECT OF ESTABLISHMENT.—The boundaries designated for the Heritage Area represent the area within which Federal funds appropriated for the purpose of this title may be expended. The establishment of the Heritage Area and its boundaries shall not be construed to provide any nonexisting regulatory authority on land use within the Heritage Area or its viewshed by the Secretary, the National Park Service, or the management entity.

SEC. 611. USE OF FEDERAL FUNDS FROM OTHER SOURCES.

Nothing in this title shall preclude the management entity from using Federal funds available under Acts other than this title for the purposes for which those funds were authorized.

SEC. 612. AUTHORIZATION OF APPROPRIATIONS.

(a) IN GENERAL.—There are authorized to be appropriated to carry out this title—

(1) not more than \$1,000,000 for any fiscal year; and

(2) not more than a total of \$10,000,000.

(b) 50 PERCENT MATCH.—Financial assistance provided under this title may not be used to pay more than 50 percent of the total cost of any activity carried out with that assistance.

## Appendix 2 – Evaluation Methodology

### Background and Purpose

In May 2008, Congress passed legislation<sup>3</sup> which requires the Secretary of the Interior to evaluate the accomplishments of nine National Heritage Areas (NHAs) no later than 3 years before the date on which authority for Federal funding for each of the NHAs terminates. Based on findings of each evaluation, the legislation requires the Secretary to prepare a report with recommendations for the National Park Service's future role with respect to the NHA under review. Since this legislation passed, the National Park Service has adopted a policy to evaluate all NHAs, preferably three years prior to their funding sunset. All evaluations use the same methodology. The Oil Region Heritage Area was not one of the nine NHAs referenced in P.L. 110-229; however, it was selected for evaluation under this new policy.

The National Parks Conservation Association's Center for Park Management (CPM) conducted the first evaluation of Essex National Heritage Area in 2008. In 2010, CPM, in partnership with the National Park Service (NPS), then contracted with Westat to evaluate the next two NHA sites: Augusta Canals in Augusta, GA and Silos and Smokestacks in Waterloo, IA. Each evaluation was designed to answer the following questions, outlined in the legislation:

1. Based on its authorizing legislation and general management plan, has the Heritage Area achieved its proposed accomplishments?
2. What have been the impacts of investments made by Federal, State, Tribal and local government and private entities?
3. How do the Heritage Areas management structure, partnership relationships and current funding contribute to its sustainability?

Westat has since completed 10 additional evaluations, and is currently performing three more. This document presents Westat's methodology for conducting these evaluations. This methodology includes: our core evaluation approach; evaluation design; associated data collection methods, sources, and measures; and analysis and reporting plans. Our methods build upon the methodology and instruments used in previous Augusta Canal and Silos and Smokestacks NHA evaluations.

In addition to outlining our core approach to the evaluation, this document describes the process Westat will use to tailor the approach for each of the specific NHA evaluations.

### Core Evaluation Approach

Our approach to the NHA evaluation centers around three basic principles – stakeholder collaboration, in-depth and triangulated data collection, and efficiencies of time and effort. The evaluation will use a case study design, examining each NHA individually. The case study design is appropriate for addressing the NHA evaluation questions since there are multiple variables of interest within each NHA and multiple sources of data with the need for convergence or triangulation among the sources. As noted below, data sources in each site will include documents, key informants from the coordinating/management entity and partner organizations, and community stakeholders. Data collection will be guided by a case study protocol outlining the domains and measures of interest using topic-centered guides for extracting data from existing sources and for interviewing key informants (individually and in group interviews).

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<sup>3</sup> From P.L. 110-229, Section 462. EVALUATION AND REPORT, signed May 8, 2008

The evaluation will incorporate a collaborative approach with project stakeholders to ensure that it is relevant to all and is grounded in the local knowledge of the site as well as designed to meet legislative requirements. Therefore, in the design and implementation of each evaluation, we will include the perspectives of NPS and NHA leadership. Working products will be developed in close coordination with NPS and the NHA evaluation sites throughout the evaluation process. Involving all key stakeholders and including varying perspectives at each stage of the process will ensure that the data collection methods and indicators, the analysis, and interpretation of the findings reflect their views and concerns.

### **Core Evaluation Design and Measures**

Westat is developing a core evaluation design that will then be tailored for each NHA evaluation. Three tools guide the development of the core evaluation design: the NHA Logic Model (Figure 1), the NHA Domain Matrix (Appendix C of the Guide), and a comprehensive case study protocol. The basic structure of the NHA Logic Model is a visual representation of the:

- overarching goal for a NHA;
- resources and key partnerships available to help an NHA accomplish its goals;
- activities and strategies that are being implemented to accomplish the NHA goal;
- intended short- and long-term outcomes; and
- the linkages among the activities, strategies, and outcomes.

The logic model provides a blueprint for the case study design, outlining the components to examine, the indicators to measure, and the relationships to investigate between the various activities and outcomes. It therefore is a key tool for outlining the data that should be collected as well as the types of analyses that might be conducted. In addition, it provides an efficient way to display the underlying logic or framework of the NHA. For the core evaluation design, the NHA logic model has guided the development of the NHA Domain Matrix, which will in turn inform the development of a case study protocol to conduct the evaluation.

The NHA Domain Matrix is designed to thoroughly address the three key evaluation questions outlined in the legislation. The left-hand side of the matrix lists the key domains and measures required to answer each evaluation question. Each of these domains and measures are cross-walked with the potential data sources. Many of the domains will be informed by more than one data source, as is typical in a case study, to provide for more valid and complete results through triangulation of multiple perspectives. The sources for data collection include: existing NHA documentation, including foundational and financial documents; interviews with NHA staff and key partners; and input from citizens in the NHA community. A later section of this methodology will provide greater detail about the selected data sources and process for data collection. A brief synopsis of the Domain Matrix and how it guides our approach to addressing the key questions follows:

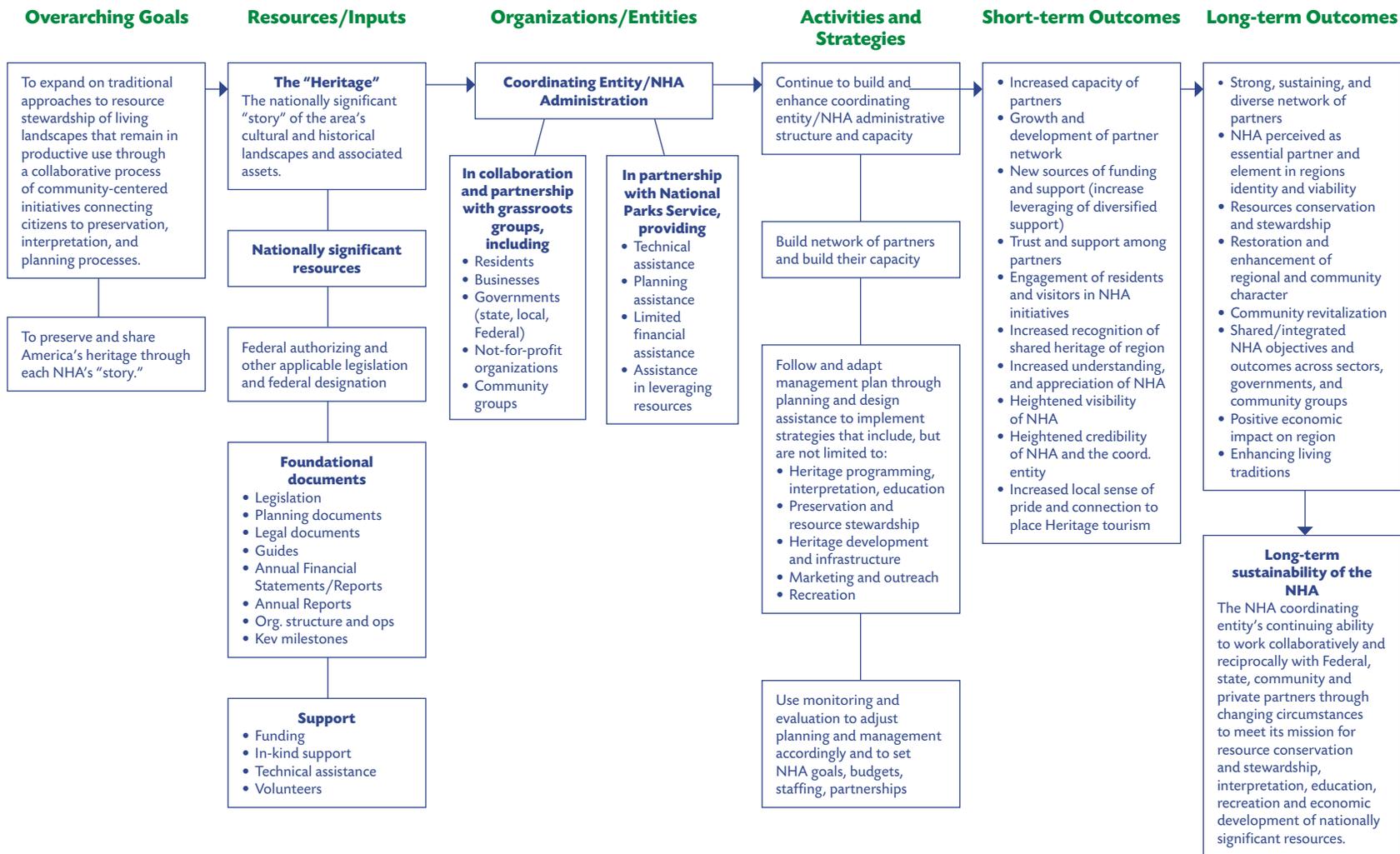


Figure A2.1 NHA Logic Model

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**Evaluation Question 1** Based on its authorizing legislation and general management plan, has the heritage area achieved its proposed accomplishments?

In addressing this question, we will collect data through interviews and documents on the nature of the proposed NHA activities; how these activities are being implemented by the local coordinating entity/ management entity, partnership network and/or the local community; and, the impacts of the activities. The measures also will address whether the NHAs are implementing the activities proposed in the initial NHA designation, and if not, what circumstances or situations may have led to their adaptation or adjustment. This examination consists of in-depth interviews with staff to understand what activities have resulted from the NHA designation that was initially not intended or expected. Also, in assessing the goals and objectives of the NHA, we will try to discern if there were mechanisms in place prior to establishment of the NHA intended to achieve these goals.

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

Addressing this question will begin with gathering information through interviews with key NHA management staff and a review of financial data forms. Understanding what investments have been made will involve collecting data on both financial and non-

financial investments, including data on the amount, nature, and sources of these investments over time. We will also examine the impact of these investments and how they are helping the NHAs achieve their intended outcomes through data collected from reviewing NHA plans and interviews with key partners and local residents of the NHA community. In cases when an NHA has numerous investment sources, we will focus on the NHA's "major" sources and whether these sources are restricted or unrestricted funds. To identify "major" sources of investment, we will examine the range of investment sources and characterize them by financial or time commitment thresholds.

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**Evaluation Question 3** How do the heritage areas management structure, partnership relationships, and current funding contribute to its sustainability?

Data to inform this question will be primarily gathered from interviews with key NHA management staff and a subset of NHA partners, and by performing a review and analysis of the NHA financial documents. The definition of sustainability developed by the NPS working group<sup>4</sup> will be employed in addressing this question. We will examine the nature of management structure and partnership network and their contribution to sustainability. We will also assess the financial investments over time and their corresponding impact on the financial sustainability of those investments and their future with and without future Federal funding. Specifically, we will perform an analysis of the ratio of Federal funding to other fund sources and the change in this ratio over time overall

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<sup>4</sup> The National Heritage Area coordinating entity's continuing ability to work collaboratively and reciprocally with Federal, state, community and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation and economic development of nationally significant resources.

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

- Coordinating entity and the National Park Service honoring the legislative mandate of the National Heritage Area;
- Coordinating entity's management capacity including governance, adaptive management (such as strategic planning), staffing and operations;
- Financial planning and preparedness, including the ongoing ability to leverage resources in support of the local network of partners;
- Partnering with diverse community stakeholders including serving as a hub, catalyst and/or coordinating entity for on-going capacity building, communication and collaboration among local entities;
- Program and project stewardship where the combined investment results in the improved economic value and ultimately long-term quality of life of that region; and
- Outreach and marketing to engage a full and diverse range of audiences.

and for specific activities. We will also interview NHA leadership and board staff to understand the extent to which fundraising activities have been prioritized for specific activities. Based on these analytic and data collection activities, an attempt would be made to determine what the likely effects on the NHA would be if Federal funding was reduced or discontinued; specifically, which activities might have a prospect of continuing with reduced or discontinued Federal funding, which would likely end with reduced or discontinued Federal funding, and therefore, which goals and objectives might not be reached. The evaluation will also examine if there are activities that support issues of national importance, and thus, should be considered for other Federal funding. Finally, the evaluation will address how other organizations that exist within the Heritage Area would be affected by the sunset of Federal funds, and if there are mechanisms in place for these organizations to work toward the Heritage Area goals post-sunset.

### **Data Collection Methods**

The planned data collection methods include: topic-centered interviews with NHA management staff; topic-centered interviews with members of the NHA partner network; intercept conversations with community stakeholders; review of the NHA plans and legal documents; review of the NHA guides, brochures, websites and other descriptive documents; and review of the NHA financial data records. In the sections below, we describe each of these methods, including how we will select the data sources, what data we will collect, and the tools we will use to collect the data. For each of the methods, we will begin by developing a “generic” instrument that corresponds to the key elements outlined in the domain matrix. The process for tailoring the instruments to each of the evaluation sites include:

### **Foundation Documents Review**

A first set of documents will be reviewed to frame the decisions and actions of the coordinating entity’s role in implementing the designated NHA’s objectives. These documents provide many of the objectives

for the NHA and frame expectations for the local coordinating entity. These documents include:

- Legislation – all Federal, state and/or local legislation that provides the legal framework for the NHA
- Plans – all planning documents, including updates, developed by the coordinating entity and/or partners that are intended to deliver the legal mandates defined by Congress and/or other legislative bodies
- Legal documents – documents signed by the coordinating entity that allow it conduct/produce routine NHA business

Another set of documents will be obtained and reviewed to understand the nature of NHA activities and their relationship with NHA objectives. These documents include:

- Guides – documents designed to define how NHA business operates
- Annual financial statements and reports – includes audits, tax returns, budget activities and performance program reports
- Annual reports – includes reports to Congress, to partners and to the NPS and others
- Organizational structure and operations – how the coordinating entity, board(s) and committees do NHA work, their roles and functions
- Key milestones – a timeline of major events that document the evolution of the NHA to include outside influences affecting your planning and implementation process

We will collaborate with each of the NHA coordinating entities and NPS to gather these materials. We will also provide sample table shells to help NHA coordinating entity staff understand evaluation data needs and identify relevant documents to share with Westat.

In reviewing these documents, we will abstract information into tables that historically documents NHA activities, such as the number of visitors or

number of workshops offered per year. We will also use a case study protocol to abstract key information and make use of data analysis software, such as NVivo, to meaningfully structure the data. This review of documents will be critical in helping us tailor the specifics of the evaluation for each site, particularly in selecting NHA staff and partners to interview.

### **Financial Data Review**

Our approach to the financial data review is informed by the Augusta Canal and Silos and Smokestacks evaluations, particularly with respect to the types of data collected and the nature of the analyses performed. We will review key NHA financial data records such as audits, tax returns, budgets and performance program reports to collect data on the amount and sources of funding for the NHA, trends in funding over a 10-year period, and the impact of these resources on the economic sustainability of the NHA. We will coordinate with each of the NHA coordinating entities and NPS to gather these materials and collect supporting documentation regarding external matching contributions and use of NHA resources according to program areas. We will use a protocol to guide the review of financial data needs with each NHA site.

### **Topic-Centered Interviews with Staff of the NHA Coordinating Entity**

During a follow-up site visit, key staff from the NHA coordinating entity will be interviewed. The staff will include the Executive Director and staff in key roles identified through review of the foundational documents. For example, some of the staff selected for interviews could include managers of specific NHA activities (i.e., programming or marketing directors), or staff who work in finance, development or partner relationship functions. A topic-centered, semi-structured protocol will be used to conduct each of the interviews, obtaining information about the background of the NHA, NHA activities and investments, and their associated impacts, including their contribution to NHA sustainability. We will conduct individual interviews with the staff with the most history and scope of understanding of the NHA

operations, such as the Executive Director or Finance Manager. Other staff, especially those with similar roles such as program assistants will be interviewed in groups to maximize the number of viewpoints gathered. Each of the topic-centered interviews will be semi-structured, outlining the key areas to cover and probes that are specific to the site. However, as new areas emerge, the interviews will be flexible to collect information on these areas. Although all interviews will be conducted on site at the coordinating entity, follow-up telephone conversations will be conducted as needed to capture additional information. We expect to spend 1 day interviewing up to nine staff in each NHA.

### **Topic-Centered Interviews with Members of the NHA Partner Network**

Members of the NHA partner network, including NPS, will be interviewed in order to gain an understanding about NHA activities and investments and their associated impacts, including their contribution to NHA sustainability. A topic-centered, semi-structured interview protocol will guide these interviews, some of which will be conducted individually, either in person or by telephone, and others that will be conducted through group interviews to maximize the number of viewpoints gathered. If applicable for the respective site, we expect to select 15-20 partners from each NHA to interview. In determining criteria for selecting partners to interview, we will review foundational documents and web site materials for each NHA site. These criteria will likely include the level of the partner's relationship with the NHA, the extent to which they participate and/or support NHA activities, their financial relationship and their geographic representation. We will share the list of selected partners with the NHA for completeness and will incorporate the NHA's suggestions of other partners who should be interviewed. Once this list is finalized, Westat will contact the partners for interview scheduling. We expect to have a range of stakeholders and organizations participate in these interviews adding to the multiple sources of data for triangulation.

## Community Input

Members of the NHA community will be invited to provide their input about the nature and impact of NHA activities through intercept conversations with a sample of residents in the NHA community. These conversations may take place at the Heritage Area site or at an event or place within the community. Conversations will help evaluation team gain an understanding of the community's familiarity with the Heritage Area and its unique and nationally significant aspects. The intercept conversations will also provide information about the residents' awareness of and appreciation for the Heritage Area. Westat will work with the NHA management entity to develop strategies for obtaining community input.

It is important to recognize the limitations in the data that will be collected through the community input strategies. First, as we will be identifying "convenient" groups of individuals, it is likely that those involved will not be fully representative of local residents, tourists, and volunteers. Depending on how they are identified, they have more or less motivation to be interested in the NHA. In addition, the data collected will be largely qualitative. We will not be able to develop quantitative indicators of the community input, but rather collect more impressionistic input that will provide an indication based on each respondent's background, prior involvement, and interest as to how well the NHA is enhancing community awareness of, appreciation of, and involvement in the NHA.

## Analyze Data and Findings Document

The analysis and synthesis of each NHA's data will be guided by the overall protocol and the Findings Document outline. Data reduction will begin by summarizing the data within each domain area, first within each source, and then synthesizing the data across sources. Attempts will be made to reconcile any issues or discrepancies across the sources by contacting the relevant parties at each NHA. Data will be summarized within each domain and analyzed for relationships, guided by the logic model. To the degree possible, results will be displayed graphically and in tables. Findings will reflect the triangulated information – where appropriate and feasible, it

will be important to ensure that the results not only reflect the perspectives of the key informants but are substantiated with data from documents and other written sources.

Results of each NHA evaluation will be communicated in a Findings Document. The findings document will be guided by a modification of the outline finalized by the NHA Evaluation Working Group. The Findings Document outline was developed according to Westat's experience with the Augusta Canal and Silos and Smokestacks evaluation, and has been streamlined to present key findings in an Executive Summary, combine sections according to the three evaluation questions, and address sustainability questions regarding the impact of the sunset of Federal funds on NHA activities. Westat will first share a draft of the findings document with the Executive Director of the NHA coordinating entity for a review of technical accuracy. The Executive Director will have the opportunity to share the findings document with other staff and stakeholders as desired, and can provide comments to the evaluation team, either in writing or via telephone discussion. Finally, if necessary to discuss differences, a joint telephone conversation involving the NHA Executive Director, NPS and Westat can be held to discuss the comments and to arrive at a resolution. Once Westat has incorporated the feedback, the NHA coordinating entity will have another opportunity to review the findings document before it is shared with NPS. Once the NHA's final feedback is reviewed and incorporated, Westat will submit the draft findings documents to NPS for review. Westat expects to have the Final Findings Document for each evaluation complete by July 2012.

## Tailoring the Evaluation Design for NHA Evaluation Sites

The core evaluation design will be tailored to the six NHA sites under evaluation. A preliminary "Meet and Greet" visit to the NHAs will largely inform how the protocols should be customized for each site, including the domains that are relevant, the probes that should be added to inquire about each domain, and the specific data sources that are relevant for the site. We will work with the Executive Director to determine the

key staff to involve in individual and group interviews during a second site visit, partner organizations that should be represented, and strategies to obtain community input.

A customized logic model for each NHA will be developed during the initial site visit; detailing the respective NHA's goals, resources, partnerships, activities and intended outcomes. This process will involve a group meeting with NHA management staff and NPS partners to get a diverse range of perspectives and obtain a complete picture of the designated NHA. In preparation for this visit, we will review existing documentation for the NHA sites. We expect these preliminary Meet and Greet visits and logic modeling sessions to involve about 2 days of travel and meeting time.

Once the tailored logic models are finalized for each NHA evaluation site, Westat will then adapt the NHA Domain Matrix and the comprehensive case study protocol that were developed as part of the core evaluation design. These tailored tools will still address the evaluation research questions identified by the legislation, but will ensure that the questions are geared toward the specific aspects of each NHA site.

Interview data collection for each NHA evaluation will occur during a second visit to each NHA site, and is expected to last 3 to 5 days depending on the scope of the site. We will use memos to keep the NHA Executive Director informed of our evaluation activities both pre- and post-site visits.

We will also work with each NHA during the second site visit, and with email and phone communications post site-visit, to collect and analyze information for the financial review. The financial data protocol will provide the NHA coordinating entity with an understanding of the data needs to address the second evaluation question guide these conversations in identifying years in which there is audit information pertinent to the evaluation and will help NHA coordinating entity staff to identify other data sources that will support the financial analysis.

## Evaluation Limitations

To the greatest extent possible, Westat has tried to ensure this evaluation methodology thoroughly addresses the three research questions. However, there are parameters to this methodology that result in a few limitations on evaluation findings. In some instances, there is a trade-off between maximizing the time and efficiency for the evaluation and the ability to thoroughly collect information from a range of stakeholders. For instance, to obtain input from community stakeholders, a survey is not possible within the current evaluation due to OMB Paperwork Reduction Requirements. Therefore, the data received from intercept conversations will be a more qualitative assessment of the community's perceptions of the NHA. As noted, limitations to the community input include convenient, rather than representative, samples of tourists, local residents, and volunteers, and impressionistic rather than quantitative data on the impact of the NHA on stakeholder knowledge, attitudes, and involvement in the NHA. Therefore, the data obtained will have to be viewed with these limitations in mind.

## Appendix 3 – Evaluation Protocols

### ORNHA Management/Staff Topic-Centered Interview Discussion Guide

#### INTRODUCTION

Thank you for talking with me today. As part of the federally mandated evaluation of the NHAs, we are talking with Oil Region National Heritage Area coordinating entity (Oil Region Alliance) staff that have the most history and scope of understanding of the NHA's operations. We developed this logic model, based on our last visit to your area, and would like to use it as a guide throughout the interview. Using this logic model as a guide, our discussion will help us gain a more detailed understanding of the Oil Region NHA site, including its background and history, your different activities and investments and their associated outcomes, and their contribution to Oil Region's sustainability.

Your participation in this interview is voluntary and it should take about 30 minutes to 1 hour to complete. We've reviewed your management plan and other foundational documents prior to this interview. Your current mission focuses on preservation, promotion, development, and support of historical, educational, natural, recreational, residential, commercial and industrial destinations. As depicted in the logic model, ORNHA's goals include raising awareness and understanding about the impact of petroleum on the region with emphasis on expanding heritage development, increasing economic development, and encouraging tourism.

#### HISTORY AND BACKGROUND

1. Could you tell us about the organizational history and evolution prior to the NHA designation?

2. How did the NHA designation come about? How did this designation affect your strategic planning processes and management plan?

3. What was your working relationship like with NPS? Has that relationship evolved over the time you have been working with them?

4. How are the management and operations of the Oil Region Alliance currently structured?

- Probes* - Description of executive leadership and role in organization  
- Description of governance and role in organization  
- Description of staffing and volunteers

5. What is the mission and vision for the Oil Region NHA? What are the goals for the Oil Region Alliance?

6. Can you describe the various planning processes that the Oil Region Alliance has undertaken over time? When and how did you determine a need for this and what type of engagement of the larger community was necessary?

#### ACTIVITIES

We'd like to get a better understanding about some of the activities that you and other staff told us about during our first site visit. We'd like to learn about how these activities fit into your overall programming and vision for the ORNHA and who/what is involved in their implementation.

According to the logic model, the coordinating entity is involved in heritage development, economic development, and tourism destination marketing activities.

### **Heritage Development:**

Heritage development activities provide educational and inspirational opportunities for current and future generations. Examples of some of these activities include:

- Directly or through grants rehabilitate and preserve historic facilities and collections
- Support events and activities that preserve, conserve, and revitalize environmental/historic/cultural/economic resources
- Partner with municipalities, businesses, and members on joint projects
- Provide training and advocacy for historic preservation practices
- Provide educational and preservation grants
- Develop and enhance recreational assets
- Assist and develop Erie to Pittsburgh Trail
- Recognize/honor good examples of historic preservation
- Support seminars, curricula, documentaries, art, posters, kiosks/exhibits, research, and videos
- Develop or support exhibits and interpretive displays at local museums and other locations

1. For each of these activities:

- When did it begin? What was the impetus for starting it?
- What has been the role of the Oil Region Alliance?
- What has been the role of the ORNHA Administrative staff (coordinating, sponsoring, promoting, attending, staff service on Boards)?
- What has been the role of the ORNHA's partnership network?
- What has been the role of the local community (attending, promoting, supporting)?

- What have been the overall accomplishments of this activity in your area? What challenges have you encountered in implementing this activity?
- How do you evaluate and/or assess the effectiveness of it?

2. What kind of an impact do you think oversight and management of the ORNHA and its resources has had in the community?

- Probes*
- Identifying sites and interested partners
  - Presenting the story of ORNHA
  - Increasing knowledge of petroleum industry/labor history
  - Increasing pride in heritage among funders
  - Redeveloping ORNHA sites and collections
  - Protecting natural resources
  - Preserving artifacts
  - Increasing revenue for heritage development
  - Integrating subject matter expertise into programming

3. How would this activity be affected if NPS NHA Federal funding sunsets or is reduced? Are there other organizations in the community who also provide this activity in a way that supports the Oil Region National Heritage Area?

4. Are there documents you could provide us that describe this activity and how it has been implemented over the years?

### **Economic Development:**

These activities support the economic development of the surrounding Oil Region NHA community. The following activities are examples of economic development in the Oil Region.

- Promote commercial and community development to support sustainable economic growth

- Support partner and member programs and events
- Contribute to the development and promotion of region’s historic, petroleum resources, and natural gas resources

1. For each of these activities please provide the following details:
  - When did it begin? What was the impetus for starting it?
  - What has been the role of the Oil Region Alliance?
  - What has been the role of the ORNHA Administrative staff (coordinating, sponsoring, promoting, attending, staff service on Boards)?
  - What has been the role of the ORNHA’s partnership network?
  - What has been the role of the local community (attending, promoting, supporting)?
  - What have been the overall accomplishments of this activity in your area? What challenges have you encountered in implementing this activity?
  - How do you evaluate and/or assess the effectiveness of it?

2. What has/have been the greatest impact(s) of this activity in your area?

- Probes*
- Improving management capacity, self-efficacy, and credibility as a subject matter expert
  - Increasing quality of petroleum/natural gas and historical events
  - Increasing knowledge and skills on project planning, grant writing, collaborations, strategic opportunities, and fund development
  - Increasing number economic development projects
  - Increasing number of volunteers
  - Increase earned revenue and leveraged funds in area of economic development
  - Accelerate reuse of underutilized buildings and brownfield sites

3. How would this activity be affected if the NPS NHA Federal funding sunsets or is reduced? Are there other organizations in the community who also provide this activity in a way that support the Oil Region National Heritage Area?

4. Are there documents you could provide us that describe this activity and how it has been implemented over the years?

**Tourism Destination Marketing:**

Tourism destination marketing activities increase public use and awareness of the Oil Region NHA and further its economic sustainability. Tourism destination marketing may encompass the use of guides, brochures, signage, newsletters, social media, and/or participation in community events to increase public awareness of the ORNHA.

- Support events and activities that connect people to environmental/ historic/cultural resources (e.g., Walking Tours, Partnership Program, Membership Program)
- Support for special events, brochures/maps, tours/routes
- Conduct marketing and outreach (e.g., targeted emails, website, social media, signage, marketing materials)
- Develop, print, and distribute Visitor Guide
- Distribute brochures, maps, event lists, etc.

1. For each activity could you provide us details about:
  - When did it begin? What was the impetus for starting it?
  - What has been the role of the Oil Region Alliance?
  - What has been the role of the ORNHA Administrative staff (coordinating, sponsoring, promoting, attending, staff service on Boards)?
  - What has been the role of the ORNHA’s partnership network?
  - What has been the role of the local community (attending, promoting, supporting)?

- What have been the overall accomplishments of this activity in your area? What challenges have you encountered in implementing this activity?
  - How do you evaluate and/or assess the effectiveness of it?
2. How have these marketing and awareness building activities affected: (*Probe* – for each activity, how do you know any of these outcomes occurred?)
    - Increasing public awareness and knowledge of ORNHA
    - Increasing collaboration of advertising
    - Increasing awareness of investment
    - Increasing attendance
    - Increasing number of events that receive support
    - Increasing earned revenue in area of tourism destination marketing
    - Engaging public
  3. Could you tell us the overall accomplishments of your tourism destination marketing activities? What challenges have you encountered in implementing these activities?
  4. How would tourism destination marketing be affected if the NPS NHA Federal funding sunsets or is reduced? Are there other organizations in the community who also provide tourism destination marketing in a way that supports the Oil Region National Heritage Area?
  5. Are there documents you could provide us that describe the ORNHA's tourism destination marketing activities and how they have been implemented over the years?

**Technical Assistance:**

Activities that build local community capacity and assist individuals, organizations and communities who are involved in ORNHA activities. These activities could include grant-making, provision of technical assistance, or other activities.

We'd like to learn more about your technical assistance activities. According to the logic model, we know you engage in several types of activities with various organizations/agencies, such as:

- Federal legislature
- Department of Labor
- State of PA (i.e., DCNR, PennDOT, legislature, Governor)
- County governments
- Municipal governments
- Not-for-profit organizations
- Industry (e.g., Walmart)
- Travel & Convention Bureaus
- Universities
- ORNHA Members
- Subject Matter Experts (speakers and researchers)
- Volunteers
- Interns
- Friends of Tarbell House
- Artists
- Historians
- Private foundations and trusts
- Oil City Main Street Program
- Erie to Pittsburgh Trail Alliance
- Council on Greenways and Trails

1. Could you provide the following details about each of your technical assistance activities?
  - What are the types of topics covered? How do you determine topics?
  - Who are the recipients?
  - How do you determine when and to whom to offer these services?
  - If it is an event, in what region/area is it delivered?
  - Who provides [Technical Assistance Activity] (i.e., ORNHA staff, NPS staff, partners, etc.)?
  - How many times have you performed [Technical Assistance Activity] in the past year? What is the length of time for each?
  - What are the costs and funding sources for [Technical Assistance Activity]?
  - What are the goals and objectives of [Technical Assistance Activity]?

2. How long has the organization been providing [Technical Assistance Activity]? Overall, what was the impetus for starting this activity?

*Probe* - was it part of the original management plan? Seen as an unmet need in the community?

3. How has [Technical Assistance Activity] affected:

*Probe* - Probe – for each of these, how do you know any of these outcomes occurred?

- Recipients – increased knowledge and skills?
  - Partners – their capacity, the relationships among partners - in what ways?
  - The ORNHA overall and how the ORNHA is perceived more generally?
  - Community support for preservation, interpretive, educational activities?
4. Could you tell us what have been the overall accomplishments of [Technical Assistance Activity]? What challenges have you encountered in implementing this activity?
  5. How do you evaluate and/or assess the effectiveness of [Technical Assistance Activity]?
  6. How would this activity be affected if the Federal funding sunsets or is reduced? Are there other organizations in the community who also provide this activity in a way that support the Oil Region National Heritage Area?
  7. Are there documents you could provide us that describe [Technical Assistance Activity], such as the types of assistance provided, to whom and the related outcomes.

### **Other Planning and Technical Assistance Activities**

1. When did it begin? What was the impetus for starting it?
2. What has been the role of the Oil Region Alliance?

3. What has been the role of the partnership network?
4. What has been the role of the local community?
5. What have been the overall accomplishments of this activity in your area? What challenges have you encountered in implementing this activity?
6. How do you evaluate and/or assess the effectiveness of it?
7. How would this activity be affected if the Federal funding sunsets or is reduced? Are there other organizations in the community who also provide this activity in a way that support the Oil Region National Heritage Area?
8. Are there documents you could provide us that describe this activity and how it has been implemented over the years?

### **BOARD OF DIRECTORS AND ADVISORY GROUPS**

#### **Board of Directors and Advisory Groups**

1. Can you tell us about the history of and/or your role on the Board of Directors or Advisory Group? Has your/their role changed across the life of the Oil Region NHA?
2. What are the responsibilities of members of these committees? For instance, does it involve setting goals, establishing budgets and financial accountability for the Oil Region Alliance?
3. How do the skills and expertise that members of these committees bring to the table contribute to the ORNHA's sustainability?
4. Do you/ members of these committees assist with fundraising? Contribute financially?
5. What kind of fundraising plan (immediate and long-term, sustainable impacts) is in place?
6. What is the process of communication between ORNHA's staff and members of the Board of Directors and Advisory Groups?

7. What activities has ORNHA conducted over the years to garner community support? What have been your successes and challenges?
8. Can you tell us what you think have been your greatest successes and most serious challenges across the history of the ORNHA?

### **Board's Contribution to Sustainability.**

1. How do the diversity of skills and expertise that members of the Board bring to the table contribute to the ORNHA's sustainability?
2. Has the ORNHA's Board demonstrated a capacity for adaptive management over time (incl.changes in staffing levels, strategic planning, etc.)?
3. What kinds of investments has the Board made toward developing staff and career advancement opportunities?
4. Has the ORNHA's Board seemed to have set clear goals for the ORNHA with well-defined timeframes?
5. What kind of system does the Board have in place for setting annual goals or for establishing budgets?
6. What kind of process does the Board have in place for collecting data on measurable ORNHA goals and usage of those data (monitoring and evaluation)?
7. What kind of fundraising plan (immediate and long-term, sustainable impacts) is in place?
8. How does the Board of the ORNHA maintain financial accountability for the ORNHA? What kind of system is in place for this?
9. How "transparent" is the Board's system for setting goals, establishing budgets and financial accountability for the ORNHA? (Is this a public or private process)?

10. What kind of plan is in place for stakeholder development?

*Probe* - How has the ORNHA's partner network changed over the years?

11. How does the Board typically communicate with partners, members and local residents?

*Probes* - What kind of communication systems are in place for communicating with these groups?  
- How "transparent" and effective are the Board's channels of communication with governance, staff, volunteers, partners, etc.?

12. Would you say that the ORNHA's Board has a leadership role in the partner network? If so, how?

## **PARTNERS AND PARTNERSHIP NETWORK**

### **Partners and Nature of Partnerships**

1. Who are the ORNHA's key "partners" (e.g., city, state, other agencies, groups, foundations, businesses, exhibits/attractions)?
2. For each partner please provide the following information:
  - What do you see as the "purpose" of the ORNHA's partnership with [partner name]?
  - Describe [partner name]'s level of involvement with Oil Region.
  - What kinds of resources has [partner name] committed to Oil Region? For what? For how long?
3. Could you describe how an organization becomes a partner? What is the partner designation process? What are the requirements for becoming a partner?
4. What types of services or support do partners receive from the ORNHA?

5. What types of services or support do you receive from your partners?
6. How do partners support one another?
7. How has the ORNHA's partnership network evolved over time?
  - Growth in number of partners and regions over time?
  - Different types of organizations that are partners – non-profits, volunteer-led organization, for-profits, etc.
8. In what ways has the partnership network influenced your organization? Probe – look at the logic model for examples of activities in which the partnership network may have been an influence
9. What challenges have you faced with your partnership network? For instance, have there been in challenges in identifying partners, meeting their needs, engaging partners over time or in making a cohesive network of partners?

### Partner Network's Contribution to Sustainability

1. Does the ORNHA have a broad base of partners representing diverse interests and expertise?
2. How do the partners/organizations contribute to accomplishing the goals and objectives of the ORNHA? Do partners collaborate and combine their investments to accomplish ORNHA objectives? If yes, how?
3. How has the number ORNHA partners changed over time?
 

*Probe* - What kind of partner retention has the ORNHA had over the years?
4. What kinds of roles (if any) do ORNHA partners have on the board?
5. Does there seem to be trust and support among partners?

6. How would partners, and their ORNHA related activities be affected if NPS NHA Federal funding for the ORNHA discontinued or reduced? Would their activities continue to work towards accomplishing the goals and objectives of the ORNHA, and if so, how?

### ACCOMPLISHMENTS, CHALLENGES AND LESSONS LEARNED

1. In your experience, what have been some of the major accomplishments for ORNHA?
2. Could you tell us about some of the challenges the coordinating entity and the National Heritage Area face?
3. How would the ORNHA be affected if it could not be financially sustained with Federal NHA funding?

- Probes* - Which program areas/activities would be affected and how?
- What, if any, activities would continue?
  - What, if any, activities would end with the sun-setting of funds?
  - Are any of these activities of National importance and thus should be considered for further Federal funding?

4. Does being part of a larger organization impact sustainability of ORNHA, and if so, how?
5. What, if any, organizations or mechanisms currently exist outside of the Oil Region Alliance for accomplishing the goals and objectives of the ORNHA? Would these organizations or mechanisms continue to work toward the Heritage Area goals post-sunset of funding?
6. Are there ways the ORNHA has changed the region since its inception? How? In what ways? How has the ORNHA's impact changed over time?

7. What were some of the early lessons learned or unintended consequences (e.g., issues related to collaborating rather than competing with partners) in implementing the activities and strategies for the ORNHA?
8. Could you tell us about any evidence of community support for the ORNHA? What does

this look like (i.e. volunteers, funding, invitation to participate on the boards of other organizations, engagement of State leadership, etc.?)

9. What additional things would you have the Oil Region Alliance do, if any? What changes would it be helpful for the Oil Region Alliance to make?

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## ORNHA Partner Network Topic-Centered Interview Discussion Guide

### INTRODUCTION

Thank you for agreeing to meet with us today about your organization’s involvement with the Oil Region NHA site. We are researchers from Westat and we are conducting a study on National Heritage Areas. Specifically, we’re interested in learning about your work with the ORNHA coordinating entity (Oil Region Alliance) and any assistance you have either received from or contributed to the National Heritage Area. We are interested in collecting information about your relationship with the Oil Region Alliance, how it has evolved and how the Oil Region Alliance has changed over time.

Your participation in this interview is voluntary and it should take from 30 minutes to an hour to complete.

### BACKGROUND

1. Describe your organization overall. Probe – what is the type of organization (i.e. museum, historical society, etc.), what does it do, size of organization, who does it serve, size of the organization (staffing, number of active volunteers, budget), length of time it’s existed.
2. What is your position and role in the organization? How long have you been with the organization? Other positions held?

### WORK WITH OIL REGION NHA AND OIL REGION ALLIANCE OF BUSINESS, INDUSTRY & TOURISM

1. Can you briefly describe the nature of your relationship with the Oil Region NHA and the Oil Region Alliance?
2. What factors influenced your decision to become a partner with the Oil Region Alliance?
3. When and how did your partnership with the Oil Region Alliance begin? What, if any, requirements are there for being a partner?
4. What is the nature of the partnership?

*Probes* - What types of services/programs/benefits do you receive through the Oil Region Alliance?  
 - What types of services/programs/benefits does the ORNHA/Oil Region Alliance receive through you?

5. Could you describe how your organization’s program activities contribute to the ORNHA’s unique story?
6. Could you describe how your partnership with the Oil Region Alliance has affected your organization?
  - Has it had any effect on the types of visitors you get? The number? Why or why not? How do you know?

- Has it helped you identify others to work with? Did you know of these organizations before you partnered with the Oil Region Alliance?
- Has it helped you receive funding? In what ways? What funding have you received that you may not have without the Oil Region Alliance partnership?
- Has it helped you have more community:
  - Visibility?
  - Involvement?
  - Etc.?
- Does it help you identify or be in touch with other resources and best practices that you may not have known about?

### **TECHNICAL ASSISTANCE & CAPACITY BUILDING ASSISTANCE**

1. Could you describe the types of assistance the Oil Region Alliance and other types of non-financial support your organization has received from the Oil Region Alliance?
  - What type of assistance did you receive (training, consultations, facilitated meetings, brainstorming ideas, site assessments, etc.)
  - Who did you receive it from?
  - Where did you receive it?
  - How did you find out about this assistance?
  - Were there requirements for participating in these activities?
  - Did you need to pay for this assistance?
2. Could you describe how you've used this assistance to incorporate or enhance stories about the ORNHA heritage into your programming?
3. How have this assistance and your activities/offerings evolved over time?
4. What does this assistance from the Oil Region Alliance allow your organization to do? Has it allowed you to work and collaborate with other organizations in the area? What are the advantages of receiving this assistance?

### **COLLABORATION**

1. Could you describe the ways your organization collaborates with the Oil Region Alliance and/or with other NHA regional partners?
2. How does collaboration affect your organization's ability to meet its goals? Probe: Has this collaboration helped you build your financial, programming or organizational capacity?
3. Have you gained access other organizations or resources in the community because of your collaboration with the Oil Region Alliance? How? Probe – NPS, other state resources

### **OVERALL IMPACT OF PARTNERSHIP WITH ORNHA**

1. How has your relationship with the Oil Region Alliance evolved over time? Has the impact of the Oil Region Alliance changed over time – grown stronger, weaker or stayed the same?
2. Have you experienced any challenges as a result of your partnership with the Oil Region Alliance? Probe – limitations on ability to fundraise or collaborate with other organizations?
3. What leadership roles does the Oil Region Alliance play in the community? Convener? Organizer? Funder? Other?
4. Are there ways in which the Oil Region Alliance coordinating entity has changed the region over the past 11 years? How? In what ways? How has the Oil Region Alliance's impact changed over time? Probe – were there mechanisms present before the Oil Region Alliance designation?
5. Is it important for your organization to continue working with the Oil Region Alliance? Why? What factors influence your continued relationship?

6. What additional things would you have the Oil Region Alliance coordinating entity do, if any? What changes would be helpful for the Oil Region Alliance to make? In general, in what ways could they serve your needs better and the needs of the region?
7. How would your organization be affected if the NPS NHA Federal funds that support the ORNHA

discontinued? Would any of your activities that contribute to the ORNHA mission and story continue? Probe if there would be an impact on the quantity or quality of these activities?

8. What do you think would be the overall impact if the Federal funding that supports the Oil Region Alliance discontinues? Are there other mechanisms or organizations?

## ORNHA Residents/Visitors Topic-Centered Interview Discussion Guide

For Interviews at \_\_\_\_\_

Hi, my name is \_\_\_\_\_, and I'm working with the National Park Service to learn what visitors here know about the Oil Region National Heritage Area. Do you have about 5 minutes to chat with me? I'm interested in getting your opinions rather than your personal information. We can stop our conversation whenever you wish and you are free to move on at any time. Also, feel free to skip any questions you would rather not discuss.

Conversation Topics:

1. Residency:
  - Local resident
  - In-State resident
  - Out-of-State resident

2. How visitor found out about the site:

3. Reason for visiting:

4.  First time visit  Repeat visit

5. Familiarity with the Oil Region NHA history
  - Probe on source of knowledge
  - Probe on if and how this visit has enhanced their knowledge of the historical and cultural significance of the region

6. Familiarity with the Oil Region National Heritage Area
  - Probe on materials ( brochure)
  - Probe on signage (signage)
  - Probe on visiting ORNHA resources (tours, museums, trails)
  - Probe on message (themes) of ORNHA
  - Probe on what ORNHA means to them
  - If local, probe on role of ORNHA in community – economic, cultural, historic, restorative [revitalization]

## ORNHA Domain and Source Crosswalk

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.1: Has the Oil Region NHA coordinating entity accomplished the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?</b>						
<b>Heritage Development—activities provide educational and inspirational opportunities for current and future generations</b>						
<b>Describe nature of NHA activities</b>						
Description of Heritage Development Activities	X	X		X	X	
<b>Describe implementation of each activity</b>						
Role of the coordinating entity (e.g., administration of grants; provision of TA)	X	X		X	X	
Role of NHA administrative staff	X	X		X	X	
Role of the partnership network	X	X		X	X	
Role of the local community	X	X	X	X	X	
<b>Assess impact of activities</b>						
-Identifying sites and interested partners	X	X			X	
-Presenting the story of ORNHA	X	X		X	X	
-Increasing knowledge of petroleum industry/labor history	X	X	X		X	
-Increasing pride in heritage among funders	X	X	X			
-Redeveloping ORNHA sites and collections	X	X		X	X	
-Protecting natural resources	X	X				
-Preserving artifacts	X	X				
-Increasing revenue for heritage development	X	X		X		X
-Integrating subject matter expertise into programming	X	X	X		X	

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
Evaluation Q.1: Has the Oil Region NHA coordinating entity accomplished the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?						
<b>Economic Development—Activities that relate to the increased economic development of the Oil Region NHA</b>						
<b>Describe nature of NHA activities</b>						
Description of economic development activities (e.g., coordination with private developers)	X	X		X	X	
<b>Describe implementation of each activity</b>						
Role of the coordinating entity (e.g., creation of economic development plans)	X	X		X	X	
Role of NHA administrative staff	X	X		X	X	
Role of the partnership network	X	X		X	X	
Role of the local community	X	X	X	X	X	
<b>Assess impact of activities</b>						
Improving management capacity, self-efficacy, and credibility as a subject matter expert	X	X	X	X	X	X
Increasing quality of petroleum/natural gas and historical events	X	X	X	X	X	X
Increasing knowledge and skills on project planning, grant writing, collaborations, strategic opportunities, and fund development	X	X			X	
Increasing number economic development projects	X	X	X	X	X	
Increasing number of volunteers	X	X				
Increase earned revenue and leveraged funds in area of economic development	X	X		X		X
Accelerate reuse of underutilized buildings and brownfield sites	X	X	X	X	X	X

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
Evaluation Q.1: Has the Oil Region NHA coordinating entity accomplished the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?						
<b>Tourism Destination Marketing – activities increase public use and awareness of the Oil Region NHA and further its economic sustainability</b>						
<b>Describe nature of NHA activities</b>						
Description of tourism destination marketing and advertising activities (e.g., promotional materials, events programming)	X	X	X	X	X	
<b>Describe implementation of each activity</b>						
Role of the coordinating entity (e.g., creation of marketing plans)	X	X		X	X	
Role of NHA administrative staff	X	X		X	X	
Role of the partnership network	X	X		X	X	
Role of the local community	X	X	X	X	X	
<b>Assess impact of activities</b>						
Increasing public awareness and knowledge of ORNHA	X	X	X		X	
Increasing collaboration of advertising	X	X	X	X	X	
Increasing awareness of investment	X	X	X		X	
Increasing attendance	X	X	X	X		
Increasing number of events that receive support	X	X		X	X	X
Increasing earned revenue in area of tourism destination marketing	X	X		X		X
Engaging public	X	X	X		X	

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
Evaluation Q.1: Has the Oil Region NHA coordinating entity accomplished the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?						
<b>Technical Assistance – Activities that build local community capacity and assist individuals, organizations and communities who are involved in NHA interpretation, education, preservation and development activities</b>						
<b>Describe nature of NHA activities</b>						
Description of technical assistance activities (e.g., leading conferences and workshops; technical assistance to local organizations; targeted financial assistance, catalyst, facilitation, convening, negotiating)	X	X		X	X	X
<b>Describe implementation of each activity</b>						
Role of the coordinating entity (e.g., coordinating, planning)	X	X		X	X	
Role of NHA administrative staff	X	X		X	X	
Role of the partnership network	X	X		X	X	
Role of the local community	X	X	X	X	X	
<b>Assess impact of activities</b>						
Increased capacity of partners	X	X				
Growth and development of partner network	X	X				
Trust and support among partners	X	X				
Heightened credibility of NHA	X	X				
Economic impact/job creation	X	X				

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.2</b> What have been the impacts of investments made by Federal, State, Tribal, and local government and private entities?						
<b>Describe financial investments</b>						
Amount of NPS NHA Federal funding over time	X			X		X
Amount of other Federal funding over time	X			X		X
Amount and sources of other funds over time	X			X		X
In-kind match support over time	X			X		X
Nature/amount in grants sought and grants awarded over time	X			X		X
Amount/diversity of donor contributions over time	X			X		X
<b>Assess impact of financial investments</b>						
Amount of dollars committed to each NHA activity (heritage development, economic development, tourism destination management) over time	X	X	X	X	X	X
Revenue generated from NHA program activities	X	X	X	X	X	X
Consistency of donor support	X	X	X	X	X	X
Expansion of base of donors over time	X	X	X	X	X	X
Economic impact/job creation	X	X	X	X	X	X
<b>Describe other types of investment</b>						
Partnership contributions (e.g., time, staff, resources)	X	X	X	X	X	X
Community contributions (e.g., volunteerism)	X	X				X
Other in-kind donations	X	X				X

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.2</b> What have been the impacts of investments made by Federal, State, Tribal, and local government and private entities?						
<b>Assess impact of other investment sources</b>						
Educational impacts	X	X		X		
Marketing and promotional	X	X		X		
Staff enhancement and retention	X	X		X		X
Land/facilities acquisition	X	X				X
Economic impact/job creation	X	X				
<b>Research Question, Domains, Measures</b>	<b>NHA Management Interviews</b>	<b>Partner Network Interviews</b>	<b>Community Input</b>	<b>Plans, Legal Documents</b>	<b>NHA Guides, Brochures, Web Sites, Other Documents</b>	<b>Financial Data Forms</b>
<b>Evaluation Q.3</b> How do the NHA management structure, partnership relationships and current funding contribute to its sustainability?						
<b>Describe nature of management structure</b>						
Description of management structure	X	X		X	X	X
Description of NHA mission and vision	X	X	X	X	X	
Description of NHA goals	X	X		X	X	
Description of staffing and volunteers	X	X		X	X	
Description of governance & role in organization	X			X	X	
Description of executive leadership & role in organization	X			X	X	

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.3 How do the NHA management structure, partnership relationships and current funding contribute to its sustainability?</b>						
<b>Assess coordinating entity's contribution to sustainability</b>						
Diversity of skills and expertise	X	X		X		
Capacity for adaptive management over time (incl. changes in staffing levels, strategic planning, etc.)	X			X		X
Investments in developing staff and career advancement opportunities	X	X		X		
Clear NHA goals with well-defined timeframes	X			X		
System for setting annual goals or for establishing budgets	X	X		X		X
Systematic process for collecting data on measurable goals and usage of data (monitoring and evaluation)	X			X		
Established fundraising plan (immediate and long-term, sustainable impacts)	X	X		X		
Established system of financial accountability	X	X		X		X
Transparency of systems for setting goals, establishing budgets and financial accountability (a public or private process)	X			X		
Stakeholder development plan (sustainable impacts)	X			X		
Growth and development of partner network	X	X		X		
Transparent and effective communication channels with governance, staff, volunteers, partners, etc.	X	X		X		
Established and consistent communication mechanisms with partners, members and local residents	X	X		X		
Coordinating entity has leadership role in partner network	X	X				

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.3</b> How do the NHA management structure, partnership relationships and current funding contribute to its sustainability?						
<b>Describe nature of partner network</b>						
List of partners	X	X		X	X	
Purpose of each partnership	X	X		X		
Partners’ involvement with NHA	X	X		X		
Resource commitment from partners (for what? for how long?)	X	X		X		
<b>Assess partner network’s contribution to sustainability</b>						
Broad base of partners representing diverse interests and expertise in the NHA	X	X		X	X	
Partner collaboration and combination of investments to accomplish NHA objectives	X	X		X	X	
Partner retention over time	X	X				
Number of partners over time	X	X		X		
Partners’ role(s) on NHA boards	X	X				
Trust and support among partners	X	X				
<b>Assess financial sustainability</b>						
Amount of dollars committed to each NHA activity over time	X	X		X	X	
Allocation of Federal funds over time	X			X	X	
Sources and amount of leveraged funds over time	X	X		X	X	
Activities that can continue post-sunset of Federal dollars	X	X				

**ORNHA Domain and Source Crosswalk** (continued)

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews	Community Input	Plans, Legal Documents	NHA Guides, Brochures, Web Sites, Other Documents	Financial Data Forms
<b>Evaluation Q.3</b> How do the NHA management structure, partnership relationships and current funding contribute to its sustainability?						
<b>Assess economic impact on sustainability</b>						
Resource stewardship resulting in improved economic value of NHA	X	X				X
Improved earned income over time	X	X				X
Trends in return on fundraising investment	X					X
Trends in contribution and grants ratio – indicates dependence on voluntary support	X					X
Trends in debt ratio	X					X
Trends in average annual operating revenue	X					X
Economic impact/job creation	X	X				

## Appendix 4 – Timeline of NHA Key Events

Year	Activity
1989	Feasibility Study for “Oil Region Heritage Park”
1993	“Oil Region Heritage Park Management Action Plan Inventory Report” published.
1994	Governor Robert P. Casey designated PA Oil Heritage Park including Venango County and eastern Crawford County, approving the “Management Action Plan for the Oil Region Heritage Park.”
1996	OHP Steering Committee becomes Board of Directors when Oil Heritage Region, Inc. is incorporated as nonprofit entity classified by the IRS as 501(c)(3) tax-exempt corporation.
1996	OHR Manager’s office moves from Venango County Courthouse Annex into shared space in Oil City along with VEDC, OCCDC, FICDA, Keystone Enterprise Zones, OHRTPA, and other economic development agencies.
1998	“Oil Heritage Region; Interpretive Prospectus” approved.
2001	“Oil Heritage Region Strategic Marketing Plan approved, including regional marketing symbol for use by multiple partners.
2004	Letter of Intent to Merge co-signed by Venango Economic Development Agency, Oil City Community Development Corporation, Oil Heritage Region Tourist Promotion Agency, and Oil Heritage Region, Inc.; followed by signed Corporate resolutions to merge.
2004	Federal Public Law 108-447 is passed by Congress on November 20, 2004, designating the Oil Region National Heritage Area and its administrative entity, with same boundaries as used for PA Oil Heritage Region. President George W. Bush signs HR 4818. Earlier in the year, updated the OHR Management Action Plan.
2005	Merger forming Oil Region Alliance of Business, Industry and Tourism takes effect January 13, 2005. Federal NPS funding To ORA for ORNHA begins. Executive Directors of the Merged entities become vice presidents, and new president is recruited from Texas.
2006	“Oil Heritage Region Management Plan Augmentation 2006” adds sections related to federal designation and responsibilities.
2006–2010	ORA administers OIL 150 nationwide, including events, celebrations, educational posters and materials, museum kits, specialty products, documentaries, new website, and additional temporary staff. Official celebration period was August 1, 2008–December 31, 2009, especially August 27, 2009.
2008	Secretary of the U. S. Department of the Interior signs the Oil Region National Heritage Area’s Management Action Plan Augmentation.

Year	Activity
2010	“Oil Region Alliance Strategic Business Plan for 2010-2015” adopted. ORA staff completes move from rented space in the National Transit Building in Oil City into ORA-owned property also in Oil City.
2011	ORA corporate logo revised and then used throughout system.
2012	ORA personnel compliment is significantly down-sized following change of leadership.
2013	ORA adopts Asset-Based Economic Development philosophy.
2014	ORA Board of Directors downsizes and revises Bylaws accordingly.
2015	“Oil Region Alliance 2014 Annual Report and 10-Year Review” published. “ORNHA Sustainability Plan” prepared. Westat, Inc., begins an Independent evaluation of ORNHA as per NPS NHA evaluation guidelines.

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## Appendix 5 – Oil Region Alliance Board of Directors and Staff

### OIL REGION ALLIANCE BOARD OF DIRECTORS

**Rodney C. Griffin**

Chair  
Specialty Fabrication & Powder Coating

**Terry Danko**

Vice Chair  
Marquette Savings Bank

**Neil McElwee**

Secretary  
Oil Creek Press

**Betsy Kellner**

Treasurer  
Venango Museum of Art, Science & Industry

**Deb Sobina**

Asst. Secretary-Asst. Treasurer  
Venango College of Clarion University

**Janet Aaron**

Executive, Retired

**Emily Altomare**

Titusville Area Chamber of Commerce

**Jerry Brosius**

Cranberry Township

**Barry Cressman**

Retired Clergy

**Marcia D. Miller**

Retired Bank Executive

**William P. Moon, Jr.**

City of Oil City

**Cinda Richards**

Joy Global

**Linda Routzahn**

First Energy

**Vincent Witherup**

County of Venango

### OIL REGION ALLIANCE STAFF

**John Phillips**

President/CEO

**Dan Twombly**

Executive Vice President

**Marilyn Black**

Vice President, Heritage Development

**Mary Cochran**

Project Manager

**Chris Coxson**

Office Administrator

**Kimberly Copley-Harris**

Project Manager

**Toni Kresinski**

Project Manager

**Deb Lutz**

Vice President, Economic Development

**Kathy Bailey**

Oil City Main Street Manager

## Appendix 6 – Heritage Development Activities

Year Started	Project
2005	Began rehabilitating Neilltown Church Building (private donations)
2005	Installed interpretive signage along bike trails
2005	Established Titusville Walking Tour
2005	Began work on President Township Canoe Landing
2005	Conducted Oil Heritage Region Trail Assessment Study
2005	Constructed more miles of bike trail
2005	Administered Tourism Awareness Survey
2005	Built more Indoor Kiosks
2005	Installed more major literature holders
2005	Displayed traveling photo exhibit
2005	Studied Special Events Rail Car for OCE/TRR
2005	Inaugurated Perry Street Visitor Orientation Center
2005	Conducted Local/Regional Planning Reviews
2005	Supported development of ORA
2005	Inventoried and appraised Natural Gas Artifact Collection
2005	Rehabilitated interior of Coal Oil Johnny House
2006	Reprinted and distributed 12 oil history books that had been out of print
2006	Neilltown Church Building name to PA Most Endangered Historic Properties List
2006	Revised OHR Management Plan
2006	Began planning 2009 Sesquicentennial Discovery of Oil
2007	Refurbished Drilling Rig at Drake Well Museum
2007	Furnished and Installed Exhibits at Coal Oil Johnny House
2007	Mapped former oil boomtowns, oil farms, and historic oil wells in Oil Creek State Park
2007	Conducted Feasibility Study for a Natural Gas Museum
2007	Finished design and then constructed two scenic overlooks in Oil City

Year Started	Project
2007	Constructed and dedicated Community Gateway in Titusville
2007	Constructed new emergency exit from Lyric Theatre
2007	Selected vendors and drafted script for OIL150 Documentary Broadcast-quality Film
2007	Expanded collaborative marketing of Oil Creek State Park and State Forest at Kennerdell
2007	Acquired Tarbell House; prepared preservation plan Tarbell House
2008	Surveyed oil/gas historical sites within Oil Creek State Park
2008	Introduced region-wide historic house plaque program
2008	Offered and installed series of bike racks at key attractions
2008	Began design process for Oil Region Visitor Center in Oil City
2008	Constructed full-size derrick along I-80 in Barkeyville
2008	Videotaped “Stories of a Third-Generation Independent Oil Producer, as told by Bill Huber”
2008	With WQED, produced and distributed OIL150 documentary broadcast-quality film
2009	Improved Kennerdell Outlook
2009	Produced and installed Visitor Center inside Perry Street Station in Titusville
2009	Selected site for and designed exhibits for new Visitor Orientation Center in Oil City
2009	Provided “Preservation Consultation Services” to owners in the historic districts of the Oil Region
2009	Conducted comprehensive Historic Site Survey in Northeastern Venango County
2009	Constructed extension of McClintock Bike Trail in Cornplanter Township and Oil City
2009	Coordinated and hosted major symposium on “The Philanthropic Legacy of the Oil Pioneers”
2009	Published new biography of Edwin Drake, and other new oil history books
2010	Painted Tarbell House exterior
2010	Hosted 11 volunteer workshops re: wooden windows
2010	Constructed enhancements and safety improvements at Murray’s Scenic View
2010	Printed and distributed “Oil History Timeline” posters included in OIL 150 museum kits nationwide
2010	Printed “PA Crude” book and road trip DVD
2010	Produced new ORNHA flags and provided to partners
2010	Designed Oil City Visitor Center
2011	Provided educational materials/posters to schools in ORNHA; conducted teacher workshop
2011	Developed brochures for Tarbell House, Coal Oil Johnny House, and Neilltown Church

Year Started	Project
2011	Provided improved climate-controlled locations for Natural Gas Artifact Collection
2011	Acquired and then conducted engineering for new trailhead and canoe/kayak launch at Oil Creek Landing (private donations)
2011	Expanded non-fiction book inventory, and widen sales distribution thereof
2011	Performed detailed engineering for trails/trailheads for Titusville Queen City Bike Trail, McClintock Bike Trail, and through Borough of Emlenton; (segments of Erie to Pittsburgh Trail)
2012	Developed parts of Erie to Pittsburgh Trail
2012	Printed Art Lover’s Guide to Libraries within ORNHA
2013	Completed additional trail work
2013	Finished walls, floors, and ceilings of Tarbell House
2013	Printed “Victorian Architecture in the ORNHA” Brochure
2014	Prepared preservation plan for the Downs Building
2014	Installed Erie to Pittsburgh Trail logo signs on multiple trail segments in ORNHA
2014	Dedicated Oil City Visitor Center inside Venango Museum
2015	Created Natural Gas Industry History Traveling Exhibit
2015	Hosted Victorian Architecture Conference
2015	Began E-books project
2015	Installed more interpretive panels
2015	Enhanced Allegheny-Clarion River Valley Blueprint Communities Project

## Appendix 7 – Economic Development Activities

Year Started	Project
2005	Drafted Foreign Trade Zone and Airport Marketing & Action Plan
2005	Coordinated Keystone Opportunity Zone
2005	Participated in Industrial Recruitment
2005	Created database (Demographicsnow.com)
2005	Began Business Retention and Expansion Program (BREP)
2005	Initiated InVest workforce development program
2005	Facilitated quarterly breakfast programs (“The Breakfast Club”)
2005	Maintained database of properties along the Routes 8 and 62 corridor
2005	Acquired land for Allegheny Overlook Housing Development (using funds granted to the City of Oil City by the Commonwealth and other funds from a local bank)
2006	Started groundbreaking for Barkeyville Industrial Park (state and local funds)
2006	Secured Foreign Trade Zone designation for airport property
2006	Constructed Alleghany Overlook Apartments; fully occupied in less than 90 days
2006	Replaced boilers at Crawford Center and National Transit Buildings
2007	Conducted direct mail marketing of New Industry
2007	Targeted advertising
2007	Hosted prospect visits, attended trade shows, and joined networks
2007	Supported seminar series
2007	Purchased West Unit building in Franklin (private funds)
2007	Acquired more land to expand Sandycreek Industrial Park (via funds from ORA investment account) (private funds)
2007	Bolstered broadband initiative
2007	Supported municipal government outreach
2008	Assisted expansions of FedEx, Latrobe Steel, IPEG, Vantage Holding Company, and Glenn Hawbaker
2008	Investigated Brownfield development
2008	Implemented Southern Venango Designated Growth Areas

Year Started	Project
2008	Encouraged local business expansion
2008	Analyzed BREP interview results
2009	Focused on local industry development
2009	Applied for Oil City Main Street Community designation, with City of Oil City
2009	Designated by PA DCED to administer PIDA loans
2009	Received RCAP grant notice to expand Sandycreek Industrial Park
2010	Developed a library of information
2010	Hosted Marcellus Shale Showcase, webinars, and business technical assistance
2010	Began engineering work on expansion of Sandycreek Industrial Park
2010	Assisted expansions of Matric, Franklin Bronze, Penn North
2011	Established and provided office for Venango Co. chapter of SCORE
2011	Created an Oil Region Incentive Program
2011	Transformed ORA website for economic development
2011	Developed and Implemented “Strategic Response Program”
2011	Worked with other municipalities to spur small business activities
2011	Used “Cluster Industry” target marketing approach
2012	Developed infrastructure at Sandycreek
2012	Supported oil and gas industry development
2012	Acquired land for future Cranberry Township Adult Living Community (private funds)
2012	Inspected Emlenton Brownfield
2012	Began Erie to Pittsburgh Trail Entrepreneurship Business Plan Contest (Get on the Trail)
2013	Encouraged new business development (local expansion and trail/waterway-based development)
2013	Purchased Downs Building (local funds)
2014	Dedicated the expanded Sandycreek Industrial Park
2014	Continued Oil/Gas/Marcellus technical assistance
2014	Continued municipal assistance and revolving loan funds
2015	Engaged in workforce development program

## Appendix 8 – Tourism Destination Marketing Activities

Year Started	Project
2005	Continued tourism advertising
2005	Printed and distributed Visitor Guide
2005	Conducted tourism awareness survey
2005	Carried out FAM tour and hospitality training
2005	Participated in travel and conferences (e.g., PA Convention & Visitor's Bureau)
2005	Created Oil Heritage Region Tear-off Maps
2005	Installed literature racks for brochure distribution
2005	Supported Renaissance Tours by Bonnie Radwick
2005	Sponsored Kennerdell Art Festival
2005	Co-hosted Allegheny River Bass Buddy Fishing Tournament
2005	Carried out regional marketing for PA Great Lakes Region (e.g., Fishing Guide)
2005	Developed eco-tourism
2006	Co-sponsored Preservation PA Conference in Franklin
2006	Printed and distributed Oil Region Visitor Guides
2006	Responded to 55,000 requests for destination information
2006	Activated website <a href="http://www.oilregion.org">www.oilregion.org</a>
2007	Hosted birding event in May
2007	Supported television/ outdoor marketing
2007	Conducted familiarization tour for attractions and lodging
2007	Created biking map, road tour book, and motor coach book, with PaGLR
2007	Established Steering Committee of OIL150
2007	Initiated Allegheny Geocaching Trail
2008	Hosted birding festival
2008	Co-hosted FUNd Raiser—dinner and reverse raffle
2008	Bolstered Oil Country Cruise

Year Started	Project
2009	Drafted Venango Regional Airport (marketing plan)
2009	Organized Wildcatters and Oil Barons Project
2009	Oversaw OIL150 Marketing
2009	Upgraded www.oilregion.org and www.alleghenygeotrail.com
2009	Hosted PA Outdoor Writers Association Conference in Oil City
2010	Coordinated Venango County video writing, shooting, and editing
2010	Implemented Northwest PA Fishing Reports, a weekly electronic newsletter
2010	Printed and distributed Oil Region Visitor Guide
2010	All ORA staff participated in Venango Video Auction, ORA Annual Meeting and FUNdraiser events
2010	Conducted ORA membership satisfaction survey
2011	Contacted all hospitality providers for discount coupons online
2011	designed travel itineraries for www.oilregion.org
2011	Designed, printed, and distributed Visitor Guides
2011	Promoted Oil Region for golf outings
2011	Show cased “Week-End” tourism opportunities
2011	Promoted Oil Region for conferences
2011	Championed motor coach promotion
2011	Designed unique programs that tell story of local culture, arts, and humanities (e.g., Arts on 8)
2012	Designed, printed, and distributed Oil Region Visitor Guide
2012	Hosted annual OHR Historic Preservation Awards program and ceremony
2012	Hosted multiple visits by PA DCED leadership to the Oil Region
2012	Conducted trail utilization study focusing on bicycle trail segments along the Erie to Pittsburgh Trail within the ORNHA
2012	Introduced website www.grabtrails.com with the slogan “Grab Life by the Trails”
2013	Participated in trail/waterway destination marketing
2013	Developed and implemented significant multi-year marketing plan
2013	Expanded Allegheny GeoTrail Program
2013	Hosted “The Gusher” ATV and motorcycle race based in Foxburg
2013	Shifted marketing focus to Pittsburgh/Youngstown/Cleveland

Year Started	Project
2014	Printed and distributed Oil Region Visitor Guide
2014	Enhanced social media activity
2014	Maintained visitor information kiosks at Cranberry Mall, local Chambers of Commerce, and Crawford Center
2014	Published hiking-biking-water trails maps of region, with PGLR
2015	Hosted Victorian Architecture Conference in Franklin
2015	Printed and distributed Oil Region Visitor Guide

# Appendix 9 – Oil Region National Heritage Area

