



Wheeling National Heritage Area Evaluation Findings



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Executive Summary

Purpose of the Report

This report was prepared on behalf of the National Park Service (NPS) as part of the evaluation of the Wheeling National Heritage Area (also referred to as WNHA or Wheeling Heritage). The specific goals of this report are to evaluate:

1. The accomplishments of the program since its establishment as a National Heritage Area (NHA) in October, 2000 (FY 2001)
2. The level of program investments and leverage provided by NPS Heritage Partnership Program funding
3. The sustainability of WNHA as an ongoing force in the community

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

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

The Congressional legislation authorizing the Wheeling National Heritage Area (Public Law 106-291), in October 2000, pointed to several distinct legacies or themes which served as the basis for the authorization.

These included:

- Wheeling has served a significant role in transportation as a result of being the western terminus of the National Road in the 1880's and one of the largest inland ports during the nineteenth century

- The city played a major role in the development of industrial and commercial operations focused on iron, steel, boat building, glass, and textile manufacturing
- Wheeling has played a role in the restoration of Victorian culture and architecture in the nation
- Wheeling served as the capitol of the Restored Commonwealth of Virginia and was the site of the West Virginia constitutional convention as the State of West Virginia declared its independence from the Commonwealth of Virginia during the Civil War

Key Evaluation Questions

Question 1:

Based on its authorizing legislation and general management plan, has the Wheeling National Heritage Area achieved its proposed accomplishments?

Question 2:

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

Question 3:

How does Wheeling Heritage management structure, partnership relationships, and current funding contribute to its sustainability?

Evaluation Methodology

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

1. Tailoring of the evaluation design to the Wheeling Legislation and Management Plan
2. Gathering and performing an initial view of results
3. Analyzing the data and documenting findings

The process of tailoring the evaluation required working early on with Wheeling Heritage staff to assemble and review foundational documents. Such documents consisted of the enabling legislation and planning documents (such as management plans, strategic plans, and marketing and communication plans). Gathering of these documents began in conjunction with a “meet and greet” session held at the beginning of the project and was subsequently continued through conference calls and follow-up discussions over the course of the ensuing months.

During the “meet and greet” session, the ARCBridge team met with Wheeling Heritage staff and with members of the Board of Directors and visited several sites and communities to understand the work and process used in implementing the Wheeling Heritage program.

The “meet and greet” session was also an occasion where the ARCBridge team held a discussion with Wheeling Heritage staff to identify program inputs, program participants, and various types of program outputs and impacts. This discussion led to the development of a logic model which described the process by which the program staff believed that the program was able to generate impact in the community.

This early project work was followed by a later visit to carry out further data collection and interview key stakeholders on the ground. The interviews included discussions with:

- Individuals who managed partner organizations (e.g., various community, civic organizations)
- Sites and buildings where Wheeling Heritage has made restoration investments (Artisan Center, Heritage Port, Wheeling Stamping Building, Capitol Theater, Heritage Port, Main Street shops)
- West Virginia Independence Hall where Wheeling Heritage has invested in interpretive exhibits within the facility
- Wheeling Heritage Board members (focus groups)
- Previous Wheeling Heritage Executive Directors (by telephone)
- Community intercept interviews at various sites

The analysis of this material also involved examination of financial records, partnership records, and grants management records. A significant portion of the analysis was focused on finances of the organization including fundraising, non-federal matching funds, expenditures, and the overall economic impact of the program.

Key Findings

Question 1

Based on its authorizing legislation and general management plan, has Wheeling Heritage achieved its proposed accomplishments?

Congressional legislation specified that the aim of the Wheeling National Heritage Area was to preserve and to interpret the cultural and historical resources of the Wheeling area. This encompassed the role of the city as a transportation center beginning in the late 1800s and as a key developer of industry and commerce in iron, steel, textile, glass, and tobacco manufacturing.

In addition, the city has had a critical role in the history of the nation as the state of West Virginia became independent of Virginia and became part of the Union.

Section 3 of this report and Table E.1 (*see below*) outlines the overall scope of the mission and Wheeling Heritage activities addressed to Evaluation Question 1 based upon the legislation and the Wheeling Heritage Management Plan. Table E-1 makes it evident that the activities of Wheeling Heritage have been clearly focused on the purposes of the legislation and the goals outlined in the Wheeling Heritage management plan.

Purposes Specified in Legislation	Goals	Wheeling Heritage Activities
Preserve and interpret the transportation heritage of Wheeling	Preservation and interpretation of culturally important sites and artifacts related to Wheeling's role as a transportation hub beginning in the 19 th century	<ul style="list-style-type: none"> Restoration and illumination of the Wheeling suspension bridge Development of the Heritage Port and Heritage Trail Construction of the Intermodal Transportation Center
Preserve and interpret the industrial/commercial heritage of Wheeling	Preservation and interpretation of sites and artifacts tied to its industrial and commercial development	<ul style="list-style-type: none"> Renovation of the Artisan Center Restoration of the Wheeling Stamping Building Grants for signage at the Glass Museum and the Glass blowing mobile unit Grant for the Hot Glass Road Show
Preserve and interpret the area's Victorian architectural history	Preservation of architecturally important buildings and structures	<ul style="list-style-type: none"> Grants to the Oglebay Institute Investments in feasibility studies to support restoration projects at the Stone Center, State Communications, WV Northern Community College, and the Paxton Zinn building Investments in the National Register of Historic Places Nominations and Historic Preservation Tax Incentives program
Recognize Wheeling's role in the history of the United States during the Civil War	Interpretation of West Virginia's role in the Civil War	<ul style="list-style-type: none"> Investments in exhibits at the West Virginia Independence Hall Investments in the Soldiers and Sailors Memorial

Table E.1: Legislation, Goals, and Activities

Question 2

What have been the impacts of investments made by Federal, State, County and City government and private entities in Wheeling?

Section 2 of this report (Overview of the Wheeling National Heritage Area) documents economic impacts associated with Wheeling Heritage investments over the period between FY2001 through FY2012. These economic impacts were measured based upon the Census Bureau's Economic Census data from 2002, 2007 and 2012.

Specifically, ARCBridge has found that, over this period, the number of business establishments increased somewhat from 1,511 in 2002 to 1,573 in 2012. In addition, the analysis revealed that the number of paid employees doubled (from 7,573 to 15,625), the annual payroll for the entire city of Wheeling tripled (from \$144M in 2002 to \$486M in 2012) while the value of business sales more than doubled in the same period (from \$707M to \$1.7B).

During this period, a number of investments by Wheeling Heritage in the downtown area led the way to business growth. These included the development of the Heritage Port, the renovation of the Wheeling Stamping Building, the construction of the Intermodal Transportation Center and the undertaking of a number of feasibility studies to support the subsequent development of the Stone Center and several other downtown properties. Section 4 of this report (Impact of Public/Private Investments on the Wheeling National Heritage Area) documents the sources of investments in the National Heritage Area prior to national heritage designation. **This data revealed that the area now constituted as the Wheeling National Heritage Area received approximately \$21M between FY1995 and FY2000.** These included earmarked funds from the National Park Service (\$12.4M) and from the Federal Transit Administration in the Department of Transportation (\$9M).

This pool of money was used by Wheeling Heritage's predecessor organization to fund construction of the Heritage Port, the Intermodal Transportation Center, and much of the Artisan Center.

The tables in Section 4 describe the investments made in the Wheeling National Heritage Area since the enabling legislation (i.e., between FY2001 and FY2016). These data indicated that Wheeling Heritage received \$11.28M in Heritage Program funds from the National Park Service and another \$6.53M in "construction funds" (i.e., Congressionally earmarked funds) from the National Park Service between FY2001 and FY2006. Non-federal matching functions generated by Wheeling Heritage amounted to just over \$6.9M between FY2001 and FY2016. The total level of funding over the period was \$25.84M.

Section 4 also describes how Wheeling Heritage spent its funds over the course of the period between FY2001 and FY2016. **The largest category of expenditure was for site and building development which accounted for 84% of the funds that were obtained.** Educational and interpretive programs accounted for 10% of funding while arts programs amounted to 6% of expenditures.

Overall, programming activities undertaken by Wheeling Heritage consumed \$21M or 82.3% of total expenditures while management/operational expenses constituted \$4.5M or 17.7% of total expenditures.

One of the important elements of the Wheeling Heritage program is to provide staff support to the community for National Register of Historic Places Nominations and Federal Historic Preservation incentive applications. Data on the number of contributing resources to the National Register of Historic Places indicated that **Wheeling overperforms on the number of contributing resources to the National Register of Historic Places relative to other areas of West Virginia.**

That is, the number of contributing resources from Wheeling constituted more than 13% of all contributing resources in the state, while the city only reflects 1.7% of all occupied residences in the state.

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

To address this question, ARCBridge examined how Federal and non-Federal funds were expended to support the NHA program initiatives. These data indicate that Wheeling Heritage has exceeded its match requirements by \$2.96M by generating \$6.9M in matching funds in exchange for a National Heritage Fund contribution of \$11.29M. For Wheeling Heritage, the NPS Heritage Partner Program funds had a 25% match

requirement, while NPS grants (such as Save America’s Treasures grants had a 50% non-Federal match requirement.

Programmatic expenditures were divided into three categories—Site and Building Development, Education and Interpretation, and the Arts. As shown in Graph E.1 below, Site and Building Development was the focus of the largest portion of funds (84%) while Education and Interpretation made use of 10% of the funds while Arts used 6%. The large portion of expenditures attributable to Site and Building development is a reflection of the multi-million dollar Congressional earmark contribution to Wheeling Heritage. The earmarked funds tended to be focused on large site developments such as the Wheeling Stamping Building, the Heritage Port, and the Multi-modal Transportation Center.

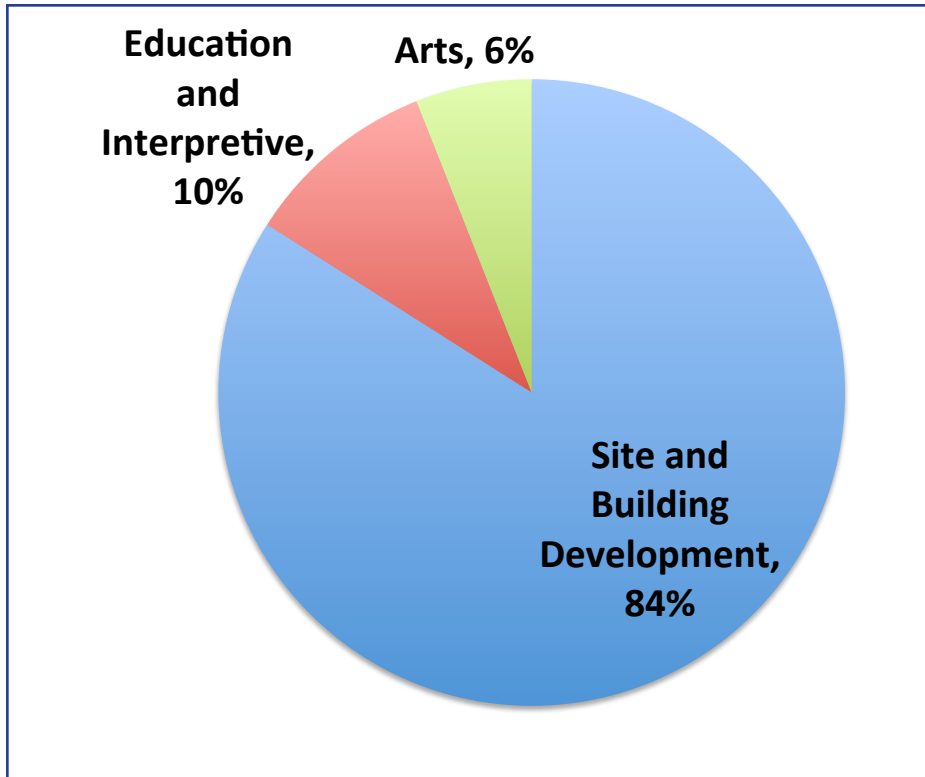


Fig. E.1: % of Program Expenditure by Area

The impact of these investments have been significant and are discussed in detail in Section 3 of this report.

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

ARCBridge analysis indicates that Wheeling Heritage has a number of key elements that contribute to its long-term capability for sustaining its financial position:

- Wheeling Heritage has a strong board of directors with backgrounds in finance and fundraising, marketing and cultural tourism, and city revitalization
 - The board has representation from leaders in the city, the state, and Ohio County
 - The board has been intimately involved in the management and strategic direction of Wheeling Heritage including a merger in the past two years
 - The organization has a staff that is well suited to the various tasks required for moving the organization forward
 - The investments made by Wheeling Heritage over the course of its operation appear to have had an impact on the Wheeling local economy based upon the results of Economic Census data from 2002 through 2012
 - The balance sheet of the organization is well-managed and currently includes a retained earnings balance of \$1.3M
- In terms of Wheeling Heritage’s history of non-Federal matching funds (required match was 25% for Heritage Partnership Program (HPP) funds and 50% for typical NPS grants funds such as Save America’s Treasures grants) the organization has over performed its match requirements by \$2.9M which indicates a strong capability of fundraising from private and foundation sources
 - Wheeling Heritage is deeply embedded in the community with 173 partner organizations that have collaborated with the organization between 2001 and 2016. This is a large number of partners in a community with a population of approximately 27,000.

Structure of this Report

This report is organized into five sections:

- **Section 1** describes the underlying purpose of the evaluation and the overall methodology used
- **Section 2** provides an overview and description of WNHA, including characteristics of the population, the area’s history, current economic conditions, and changing population. This section also describes Wheeling Heritage’s organizational structure, authorizing legislation, board membership and staffing, as well as the organization’s relationship with its partners in the community
- **Section 3** describes in detail Wheeling Heritage’s various programs and how these relate to the initial question in the evaluation—has Wheeling Heritage achieved its proposed accomplishments?
- **Section 4** analyzes Wheeling Heritage’s finances. That is, in line with evaluation question #2, what are the impacts of Federal/non-Federal funds?
- **Section 5** explores the third and final question in the evaluation—how does Wheeling Heritage’s management structure, current funding, and partnerships contribute to the program’s sustainability?

Section 1

Introduction

National Heritage Areas

National Heritage Areas (NHAs) are sites that have been established by the U.S. Congress to stimulate historic preservation, interpretation, conservation, outdoor recreation, and economic development of specific areas of the country. These areas represent blends of natural, cultural, or historic resources and are aimed at describing a unique element of the history and development of the United States. The first National Heritage Area was designated by Congress in 1984 and was the Illinois and Michigan Canal National Heritage Area. At present, there are 49 NHAs that have been authorized by Federal law.

The NHAs are managed by states or municipal authorities, local not-for-profit institutions, universities or federal commissions. The National Park Service within the Department of the Interior provides advisory-type services and some level of annual financial support (between \$150,000 and \$710,000 per NHA) from Heritage Partnership Program funding. The Congress controls the use of the designation of National Heritage Areas since it must pass legislation to authorize a specific NHA designation.

Each of the NHA organizing entities is tasked by the law with developing its own management plan that describes the key objectives set forth by the local program management organization. These objectives are specified in the enabling Congressional legislation that sets forth the specific goals of each National Heritage Area.

The coordinating entity or the managing entity generally creates an advisory or governing Board of Directors of the NHA formed by representatives from diverse segments within the local community involving businesses, elected local government officials, educational institutions, not-for-profit entities, and public institutions.

As part of its mission, the coordinating entity has the responsibility for managing the federal funds and obtaining matching funds from other sources that are obtained to implement the management plan and to execute the NHA program within the designated National Heritage Area. Wheeling Heritage is required to provide a 25% non-federal match for Heritage Program funds. Other National Heritage Areas are required to match 50% of Heritage Program funds with non-federal monies.

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

1.1 Purpose of the Report

This report was prepared by ARCBridge Consulting and Training Inc., on behalf of the National Park Service as part of the evaluation of the Wheeling National Heritage Area. In its advisory capacity, the National Park Service has the responsibility for reporting to Congress on evaluations of the performance of the various National Heritage Areas. This report provides documentation of the methods and findings of the evaluation that were conducted to assess the Wheeling National Heritage Area.

The evaluation was directed at addressing three fundamental questions:

1. Based on its authorizing legislation and general management plan, has the Wheeling National 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 in the Wheeling area?
3. How does Wheeling Heritage management structure, partnership relationships, and current funding contribute to its sustainability?

1.2 Overview of the Wheeling National Heritage Area

The Wheeling National Heritage Area encompasses the territory within the city limits of Wheeling City in Ohio County, West Virginia.

As shown in the map found in Figure 1.1 (see below), the geographic area of Wheeling City is 13.79 square miles and is located along the eastern bank of the Ohio River in the panhandle of West Virginia. The map identifies some of the key sites developed or enhanced by the coordinating entity. These include the Wheeling Suspension Bridge, the renovated Capitol Theater, Heritage Port, the Intermodal and Artisan Centers, and the Wheeling Stamping Building.

The Wheeling National Heritage Area is also home to the West Virginia Independence Hall which contains a series of exhibits related to statehood and other topics of historical importance. These exhibits have been developed by the coordinating management organization. The city is also home to the Heritage Port on the Ohio River which is used for festivals and events that attract between 250,000 to 300,000 people annually to Wheeling. Other key sites in the area include the Heritage Trail along the Ohio River as well as Victorian homes in city neighborhoods.

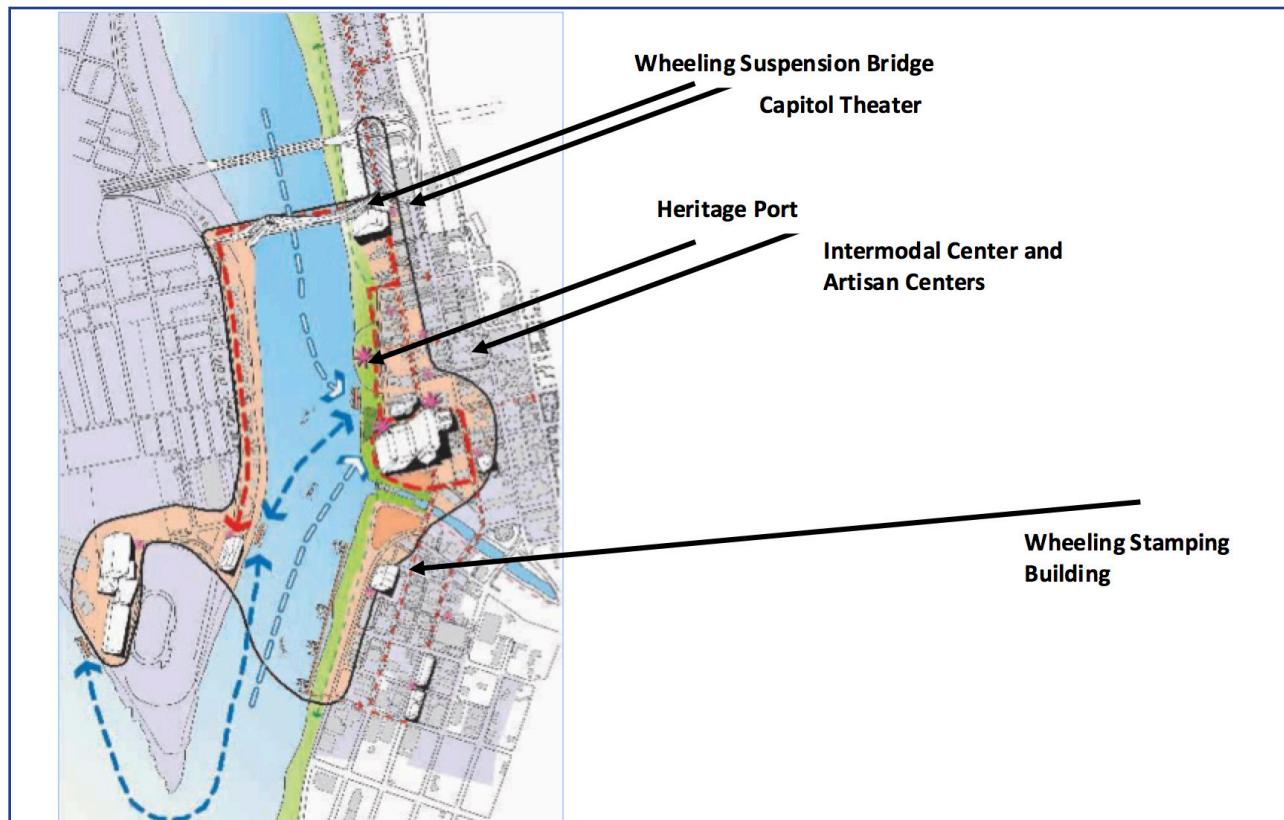


Fig 1.1: Map of Key Sites Within WNHA

Designation	Wheeling National Heritage Area was designated as a National Heritage Area in October, 2000, through Public Law 106-291, Section 157, the Wheeling National Heritage Act of 2000. The legislation recognizes that the area around Wheeling, West Virginia, represents major heritage themes of transportation, commerce and industry, and Victorian culture in America.
Location	Wheeling, West Virginia
Area Encompassed	Wheeling National Heritage Area encompasses the area bounded by the city limits of Wheeling, West Virginia
National Historic Themes	Economic development, preservation and the arts, as well as interpretation and education
Organizational Structure	Operations are managed by Wheeling Heritage. There are 22 members of the Board of Directors who represent a diverse set of skills and sources of contact. These include non-profit management, fundraising, history, architecture, construction and project management, finance, legal affairs, federal, state, and municipal government relations.
Partners	There are currently 65 formal partners and 108 informal partners working with Wheeling Heritage. Partners consist entirely of community organizations and corporations.

Table 1.1: Overview of the Wheeling National Heritage Area

It should be noted that the number of formal and informal partners reported in Table 1-1 (*see above*) may not match such numbers reported to the National Park Service. The number of formal and informal partners shown here were developed using a database of partners developed specifically for this project by ARCBridge. This database has been shared with Wheeling Heritage and has encompassed all of the program partners identified by Wheeling Heritage since 1992 (prior to NHA designation).

1.3 Evaluation Methodology

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

The Guide provides details regarding a three-phase evaluation process. In this case the process involved 1) tailoring the evaluation design to the Wheeling National Heritage Area, 2) collecting data and an initial review of results and 3) analyzing data and documenting results.

1.3.1 Tailoring the Evaluation to WNHA

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

1. An ARCBridge evaluation team worked with Wheeling Heritage staff to assemble foundational documents from the Heritage area to review such items as:
 - Enabling Congressional legislation

- Planning documents such as the Pre-designation Management Plan
- Successive management plans (after designation)
- November 2017 Strategic Plan
- Formal and Informal partners in the newly developed Wheeling partnership database
- Financial data on income, grants, and expenditures
- Annual reports of the managing entity
- Details regarding organizational structure for the staff and the board of directors

2. Early in the project the ARCBridge evaluation team visited Wheeling National Heritage Area for a “meet and greet” session during October 2017. During the visit, the ARCBridge team carried out the following activities:

- Met Wheeling Heritage staff and several members of the board of directors
- Visited several sites (Main Street Development, Wheeling Stamping Building, West Virginia Independence Hall, Artisan Center, Capitol Theater) within the heritage area to provide a better understanding of the NHA program
- Held preliminary discussions with key Wheeling Heritage staff to provide the basis for drafting a logic model to describe the program, its operations, and its impacts. This discussion focused on identifying program inputs, program participants, and various types of program outputs and impacts.

1.3.2 Site Introduction and Background Research

As a follow-up to the logic model discussion during the “meet and greet” visit, the ARCBridge team collaborated with Wheeling Heritage staff to develop a preliminary draft of the logic model as well as data collection plans for a follow-up data collection visit.

The draft logic model was shared with the Wheeling Heritage staff. The ARCBridge team then held telephone discussions with Wheeling Heritage to revise and refine the logic model in order to accurately communicate how the program appears to function and how it operates to have an impact in the community.

As part of background research, the ARCBridge team carried out a series of additional steps prior to returning to Wheeling for the data collection visit. This work included requests for information such as:

- National Park Service construction funds obtained prior to and independent of Congressional designation of the National Heritage Area in October, 2000. These funds were appropriated by Senator Byrd per a cooperative agreement between the NPS, Wheeling and the State of West Virginia.
- Lists of grants made by Wheeling Heritage
- Data on all formal and informal partners that have worked with Wheeling Heritage, the roles they played in NHA programs, the year they became engaged with the program, whether or not they had a formal agreement with Wheeling Heritage
- The number of National Register of Historic Places sites in the NHA and in other parts of the state
- The use of Federal and State Historic Preservation Tax credits in the National Heritage Area and in other parts of the state.

Part of preparation for the data collection visit involved conferring with Wheeling Heritage program staff to work out the logistics and timetable for the follow-up data collection site visit.

The ARCBridge Team undertook the data collection site visit to WNHA during the week of December 11th, 2017.

During that visit, the team conducted interviews with a series of key stakeholders who had involvement with Wheeling Heritage. Interviews included the current Wheeling Heritage Executive Director and staff members, members of the Wheeling Heritage Board of Directors, and key partners. The aim of these interviews was to understand the program, board governance, and partner views of program development.

After the visit, the team followed up this data collection with additional telephone interviews with former Wheeling Heritage executive directors to provide perspective on previous and current circumstances in the organization.

Following the visit, the team carried out a financial review and held discussions with the Chief Financial Officer to examine the various investments that the program has made and to link those investments with program outcomes.

1.3.3 Stakeholder Interviews

During the site visit, the ARCBridge team carried out interviews with the following specific individuals and organizations:

Current and Past Wheeling Heritage Staff and Board Interviews

- Jake Dougherty, Executive Director
- Pat Felton, Chief Financial Officer
- Chris Villamagna, Program Manager
- Bekah Karelis, Project Manager
- Alex Weld, Project and Outreach Manager
- Focus Group interviews with Board Officers—Arch Riley (Chairman), Steve Johnson (Vice Chairman), Craig O’Leary (Treasurer)
- Focus group interviews with government and Chamber of Commerce Representatives who are members of the Wheeling Heritage Board--Glenn Elliott (Mayor of Wheeling), Orphy Klempa (Ohio County Commissioner), Erika Storch (President, Chamber of Commerce and Representative in West Virginia House of Delegates)
- Interview with Pat Cassidy (Founding Member of the Board of Directors)
- Prior Wheeling Heritage Executive Directors - Charlie Flynn, Hydie Friend

These interviews provide perspectives on changes in the Wheeling Heritage program across two critical time periods—1) the pre-designation time period from 1992 until Congress designated Wheeling as a National Heritage Area in October, 2000 and 2) the years since designation and the present time. This was very important since the pre-designation years were characterized by high levels of earmarked funding and major investments in site and building preservation and development and later years emphasized the arts, community development, and education and interpretation. Given the reduced level of funding in the post-designation period, Wheeling Heritage has had to more aggressively seek out partners who could provide the necessary funding for programs.

Interviews with Partner Organizations

- Community Foundation for the Ohio Valley (Susie Nelson)
- Oglebay Institute (Danielle McCracken)
- WALSH Foundation (Sean Duffy)
- Capitol Theatre (Frank O’Brien, Wheeling Convention and Visitors Bureau)
- Young Preservationists (Will Wallace, Bennett McKinley)
- Friends of Wheeling (Jeanne Finstein, former Wheeling Heritage Board President)
- Grow Ohio Valley (Ken Peralta)
- Wheeling-Ohio Valley Visitor and Convention Bureau (Frank O’Brien)
- Oglebay Park (Randy Worls, Eriks Janelins, Christin Stein, Holly McCluskey)
- Sons of the American Revolution (Jay Frey, Gary Timmons) at Mt. Wood Cemetery and Ft. Henry Days
- West Virginia Independence Hall (Debbie Jones, site manager)

- Local historian (Margaret Brennan)
- RED Partnership (Craig O’Leary)
- Vintage Raceboat Regatta (Debbie Joseph)
- Show of Hands Winner (Carrie Eller, owner, Under the Elder Tree)
- Orrick Law Firm (Steve Johnston and Will Turani)

1.3.4 Data Analysis

In the final stage of the work, the ARCBridge team carried out analyses of results focused on the three key questions outlined below:

1. Has Wheeling Heritage achieved its proposed accomplishments as outlined in management plans?
2. What are the impacts of investments in the Wheeling area?
3. How does the Wheeling Heritage’s management structure, partner relationships, and current funding contribute to its sustainability?

As part of the analysis, the team assembled detailed descriptions of the various programs and projects carried out by Wheeling Heritage and assessed programs in terms of their sustainability or ability to be self-sustained over a period of time.

From a financial analysis perspective, the team examined the various sources of income for the program both prior to and since the designation of the Wheeling Heritage Area in October, 2000. The analysis also included examination of the level of matching funds obtained, and the leverage that was achieved as a result of obtaining National Park Service Heritage Program funds. In addition, the financial analysis also reviewed the effects of Wheeling Heritage on the use of historic tax credits and increases in the number of contributing resources listed the Register of Historic Sites as a result of the expertise provided by Wheeling Heritage professional staff.

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

Section 2 - Overview of WNHA

This section describes key characteristics of the Wheeling National Heritage Area, its history, its current organizational structure and staffing, and its track record in developing partners within the community. This section also includes promising results emerging from an analysis of results obtained from the 2002, 2007 and 2012 Economic Census Reports from the U.S. Census Bureau.

Section 3 - Wheeling Heritage Fulfillment of the Authorizing Legislation and Management Plan

This section describes various program activities that fulfill the mandate of the authorizing legislation and the management plan and how program activities fit into the larger scheme of community impact (via the logic model).

Section 4 - Public/Private Investments in Wheeling National Heritage Area and their Impact

In this section, ARCBridge analyzed the sources of Federal and non-Federal matching funds, the level of match that was achieved and the extent of financial leverage provided by Heritage Program funds made available by the National Park Service. The analysis also looked at impact measures including changes in the number of buildings listed in the Register of Historic Sites and the use of Historic tax credits in Wheeling relative to other areas of West Virginia.

Section 5 - Wheeling National Heritage Area Sustainability

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

1.3.5 Evaluation Limitations

ARCBridge has taken the utmost care and diligence to ensure the evaluation methodology properly addresses the three questions set forth in this report. While ARCBridge has followed the NPS Evaluation guide, it is understood that every NHA has a completely unique set of parameters. Thus, every effort has been implemented to capture the specific story of the Wheeling National Heritage Area, and variances have been discussed throughout the process during NPS monthly conference calls.

For example, in this region, the methodology employed was not always able to directly measure the impact of specific Wheeling Heritage programs on individuals and communities. There were several reasons for this including the fact that any Wheeling National Heritage Area program activity was conducted in partnership with several other local organizations, so it was sometimes difficult to pinpoint Wheeling Heritage's specific impacts. In addition, without multiple representative statistical surveys of key populations of interest (e.g. visitors to Wheeling) it was not possible to attribute attitudinal differences in opinions regarding Wheeling National Heritage Area to efforts undertaken by Wheeling Heritage.

However, it should be pointed out that Economic Census Data captured by the U.S. Census Bureau in 2002, 2007 and 2012 provide clear evidence of a positive change in the economic picture in Wheeling City. While this may be due to numerous efforts by City and State government, it is undeniable that some portion of this economic improvement is due to identifiable site development and construction investments as well as program development by Wheeling Heritage and the National Park Service.

1.4 Roles

There were three participating organizations involved in this evaluation effort—an external evaluator (ARCBridge Consulting & Training, Inc.), the National Park Service, and Wheeling Heritage.

External Evaluator

ARCBridge Consulting & Training served in the role of the independent, external evaluator. ARCBridge is a small, woman and minority owned consulting firm with over 25 years of experience working on federal government projects. ARCBridge developed the logic model, collaborated with Wheeling Heritage staff on various aspects of data collection, analyzed the data, and wrote, edited, formatted, and printed this report.

National Park Service (NPS)

The National Park Service staff provided the underlying methodology and funding for use in the evaluation, facilitated contacts with Wheeling Heritage, and provided advice and counsel throughout the project. NPS staff also provided useful context and background regarding the history of the National Heritage Area program.

Wheeling Heritage

Wheeling Heritage staff and members of the Board of Directors facilitated the evaluation by providing access to the necessary data and coordinated meetings with various individuals and partners who are engaged with the National Heritage Area.

The Wheeling Heritage team provided useful feedback and insights regarding data collection and the meaning of various data elements.

While Wheeling Heritage staff was not involved in designing the methodology or carrying out the analysis, they served in a fact-checking role throughout the project to ensure that the evaluation team was provided with accurate information and interpretation of available data and responded to queries promptly with transparency, thoroughness, and professionalism throughout this entire process.

ARCBridge provided the Wheeling Heritage team with copies of this report as it was being developed and gave its leadership an opportunity to review and to fact check the contents.

Section 2

Overview of the Wheeling National Heritage Area

This section of the report provides an overview of the geography and demographic characteristics of the Wheeling National Heritage Area along with the history of the city of Wheeling and the surrounding area.

This section also includes a description of the coordinating entity (Wheeling Heritage or WNHA), its staff, its board of directors, and its partners. Finally, this section provides a chronology of key events associated with the development of the coordinating entity.

2.1 Introduction and History of the Wheeling National Heritage Area

Wheeling, West Virginia is located along the Ohio River in the northern panhandle of the state. The area now occupied by the city of Wheeling was home to Native Americans. There are many Adena burial mounds found in this area of the Ohio Valley, dating back two thousand years. The Wheeling area was later home to Delaware, Shawnee, and Cayuga Indians when the French claimed the area in 1749.

The French claim was either forgotten or ignored as Ebenezer Zane and his family explored the area and established a claim to the land in 1769. The Zane family established the first European settlement in the nearby area of Zanesville, Ohio. As other families began joining the settlement, the United States, in 1787, assigned a portion of the land west of the Appalachian Mountains to Virginia and a portion to Pennsylvania. The Virginia General Assembly named the town of Wheeling as the county seat of Ohio County in 1797.

The town itself was incorporated in 1805 and the town was later incorporated into the City of Wheeling in 1836.

An important historic location within the town and later in the city of Wheeling is known as Fort Henry, which was originally named Fort Fincastle in 1774. The name was later changed to Fort Henry in honor of Virginia's first governor, Patrick Henry.

In the mid-1800s, the city of Wheeling was the Commonwealth of Virginia's second largest city due to its sizeable industrial base. The development of this base was due in large part to the fact that the city's location was at the center of three major transportation routes—the Ohio River, the National Road (which arrived in 1818 and linked the Ohio River to the Potomac River), and the Baltimore and Ohio Railroad, which connected Wheeling to Pennsylvania, Maryland, and other markets in the eastern part of the country.

This convergence of three transportation routes established Wheeling as a "Gateway to the West" used by many travelers heading to western states and territories. The three transportation modes also enabled Wheeling to develop manufacturing facilities for dry goods, tobacco, wagons, cut nails, textiles and building of river boats. Many of these products were used by pioneers traveling west.

The political history of Wheeling is also of interest. In the latter half of the 19th century, residents of western Virginia became increasingly concerned about their representation in Richmond, the capital of Virginia. The western part of Virginia was settled by farmers who generally did not own slaves. Citizens' negative views of slavery were amplified by the development of an industrial base which also did not rely upon slave labor, and by an influx of German immigrants who were very much anti-slavery.

Anti-slavery sentiments led to the area's secession from Virginia after the beginning of the Civil War. In fact, Wheeling became the provisional capital of the Restored Government of Virginia for a period of time between 1861 and 1863. West Virginia was then admitted to the Union in its own right in 1863.

Following the Civil War, Wheeling experienced a growth spurt as it became West Virginia's prime industrial center.

Together with its well-developed transportation facilities and an abundance of bituminous coal and natural gas from nearby mining operations, industry grew in the area and produced more than 600 products for settlers heading west and for its growing local population. These products included steel goods, cut nails, pottery, china, cigars and chewing tobacco.

The post-Civil War population of Wheeling continued to grow until it peaked between 1930 and 1940 (see Table 2-1 below).

Table 2.1: Growth and Decline of Wheeling City, West Virginia Population 1840-2016

Census[1]	Population	% Change
1840	7,885	
1850	11,435	45.00%
1860	14,083	23.20%
1870	19,280	36.90%
1880	30,737	59.40%
1890	34,522	12.30%
1900	38,878	12.60%
1910	41,641	7.10%
1920	56,208	35.00%
1930	61,659	9.70%
1940	61,099	-0.90%
1950	58,891	-3.60%
1960	53,4	-9.30%
1970	48,188	-9.80%
1980	43,070	-10.60%
1990	34,882	-19.00%
2000	31,419	-9.90%
2010	28,486	-9.30%
Est. 2016 [2]	27,375	-3.90%

[1] United States Census Bureau. "Census of Population and Housing" (<https://www.webcitation.org/6YSasqfX?url=http://census.gov/prod/www/decennial.html>)

[2] https://www.census.gov/searchresults.html?q=Wheeling+city%2C+WV&page=1&stateGeo=none&search-type=web&cssp=Typeahead&%3Acq_csrf_token=undefined

Since the 1930's the population of the city has continued to decline as the population has diminished from over 61,000 in 1930 to just over 27,000 (estimated) in 2016.

As will be discussed in later sections of the report (Sections 3, 4 and 5), the Wheeling National Heritage Area was officially established by Congressional legislation in 2000 in partial recognition of the need to enhance commercial development in the city of Wheeling.

With that perspective in mind, *Table 2-2 below* shows how the economic conditions in Wheeling have improved between 2002 and 2012 as indicated in Economic Census data gathered over that period. It should be noted that the 2017 Economic Census will not be released until 2019.

The table reveals that that there was modest growth in the number of business establishments (from 1,511 establishments in 2002 to 1,573 in 2012) over the period. But, there was substantial improvement in the value of business sales (from \$700M to \$1.7 B), in annual payroll (from \$144M to \$486M) and in the number of employees (from 7,500 in 2002 to over 15,000 in 2012). It is clear that the most rapid growth in business activity occurred between 2002 and 2007.

It is of interest that the uptick in economic activity between 2002 and 2012 occurred after the Wheeling National Heritage Area was designated by Congress in 2000. Furthermore, prior to its actual NHA designation, the Wheeling National Heritage Corporation and Wheeling Heritage Task Force, as an existing entity, made considerable financial investment in site and building restoration in downtown Wheeling based on planning with the National Park Service Northeast Regional Office from 1990-2000, with Congressionally earmarked Federal funds provided by U.S. Senator Robert Byrd through a memorandum of understanding with the National Park Service.

ARCBridge believes that the activities and investment of Wheeling Heritage and significant improvement in economic activity occurring between 2002 and 2012 is more than mere coincidence. Rather, it is a result of Wheeling Heritage Federal investment working with National Park Service and the U.S. Department of Transportation prior to 2000 and of subsequent NHA community development work by Wheeling Heritage since the National Heritage Designation in October, 2000.

Table 2.2: Economic Census Data for Wheeling City, West Virginia (2002-2012)

Economic Census Year	# of Business Establishment	Value of Business Sales	Annual Payroll	# of Paid Employees
2002	1,511	\$707,146.00	\$144,337,000	7,573
2007	1,532	\$1,503,487,000	\$484,912,000	15,784
2012	1,573	\$1,714,298,000	\$486,212,000	15,626

Source: U.S. Census Bureau

2.1.1 Current Characteristics of Wheeling City and the State of West Virginia

The 2016 estimates of the population (based upon the 2010 Decennial Census) appear as shown in *Table 2-3 below*. As the table reveals, the current population of Wheeling is just over 27,000, which reflects 1.5% of population of the State of West Virginia.

Since Wheeling is a city, population density is considerably higher than that of the state as a whole (over 2,000 persons per square mile in Wheeling City vs. 77 persons per square mile in the state as a whole). On many other characteristics such as poverty percentages, educational attainment, median housing value and median income, Wheeling City and the state of West Virginia as a whole are quite comparable.

Table 2.3: Statistical Profiles of Wheeling City and the State of West Virginia

Statistical Characteristics	Wheeling City	State of West Virginia
2016 Population Estimate	27,375	1,815.86
Land Area in Square Miles	13.79	24,038
Population per Square Mile	2,065	77.1
Median Household Income	\$38,082	\$42,644
Percent of Persons in Poverty	17.80%	17.90%
Percent High School Graduates or higher	90.70%	85.30%
Percentage of Persons without health insurance	8.10%	9.60%
Median Housing Value	\$99,300	\$107,400
Total Housing Units	14,676	884.728
Number of Companies	2,581	114,435
Male Median Income	\$29,479	\$29,859
Female Median Income	\$18,142	\$17,966
Veterans	2,219	145,171

Community Survey 5 Year Estimates

Sources: U.S. Census Population Estimate for 2016 and the 2012-2016 American

2.2 History of WNHA and Partners

Public Law 106-291, Section 157, the Wheeling National Heritage Act of 2000, was passed by the 106th Congress and signed into law on October 11, 2000. In this legislation, the management entity was designated as the Wheeling National Heritage Corporation (WNHAC), a nonprofit corporation established by the State of West Virginia. In 2016, WNHAC merged with Reinvent Wheeling, the city's Main Street program.

To kick start the development of the Wheeling National Heritage Area, funds were appropriated in FY1990 for the National Park Service in collaboration with the City of Wheeling. The purpose was to create a commission to review the historic features of the area to establish Wheeling as a unit in the National Park System. In 1990, a draft concept plan was prepared by the Northeast region of NPS (in conjunction with the Wheeling Heritage Task Force involving representatives of the state and the city) to assess the feasibility of a National Heritage Area.

The culmination of these activities led to a comprehensive plan for the development of Wheeling National Heritage Area in 1992, followed by a 1994 Community Venue Plan in conjunction with congressionally earmarked funding from the Department of Transportation and the National Park Service. These earmarked funds amounted to more than \$21M provided under the auspices of U.S. Senator Robert Byrd (D-WV) who was, at the time, chairman of the Senate Appropriations Committee. These funds covered the development of Wheeling National Heritage Area between 1992 and 2000. During that period of time, the funding was used to support building and site redevelopment including a number of major projects such as:

- Development of the Heritage Port entailing demolition of the “wharf garage”, which blocked access to the Ohio River. This riverfront site set the stage for Heritage Port events which annually attract between 250,000 to 300,000 visitors for festivals and performances
- Renovation of the Artisan Center, an industrial structure which was owned by the City of Wheeling and now houses a restaurant, retail facility, exhibit area, and office space, including the offices of Wheeling Heritage
- Construction of the Intermodal Transportation Center, an 850-space parking garage developed to replace spaces lost in demolition of the wharf garage. This facility also houses the Wheeling Convention and Visitors Bureau (CVB) Visitor Center and a transportation history exhibit
- Installation of exhibits at West Virginia Independence Hall, which had housed the US Customs Service, a federal courtroom, and a post office. The exhibits included “West Virginia—Born of the Civil War” for interpreting the complex story of West Virginia’s statehood
- Partnership with the City of Wheeling in constructing the Wheeling Heritage Trail which is a 13-mile bike trail and pedestrian walkway on the east bank of the Ohio River
- Transformation of Wheeling Stamping, an industrial building, into the global operations center for Orrick, Herrington & Sutcliffe LLP. This renovation enabled the building to retain its historic and industrial character while providing an updated office facility. This effort entailed collaboration between Wheeling Heritage, the City of Wheeling, and the Ohio Valley Industrial and Business Development Corporation

2.2.1 Authorizing Legislation and the Wheeling Heritage Mission and Vision

In conjunction with the Wheeling National Heritage Area Act of 2000, the management entity was assigned the following responsibilities:

1. Implement and coordinate the recommendations in the 1992-1994 plans
2. Ensure integrated operation of the NHA
3. Conserve and interpret the historic and cultural resources of the NHA

The 1992 Plan focused on the city's location and history as a port of entry on the Ohio River. Two context settings were established:

1. The Downtown Core, which consists of an area surrounding the Wheeling Suspension Bridge, the Waterfront adjacent to the Ohio River, the intact portions of Main and Market Street, and the Civic Arena which included West Virginia's Independence Hall and the B & O railroad terminal
2. The Historic Context, which consists of the neighborhoods surrounding the Downtown Core to the north (North Wheeling), the west (Wheeling Island) and the south (Center Wheeling)

These venues were to be linked through directional signage as well as physical transportation and pedestrian walkways outlined in the 1994 Community Venue Plans.

In conjunction with its interpretive mission, the management entity is obligated to:

- Assist the city and the state in the preservation of sites, buildings, and objects within the NHA which are listed or eligible for listing on the National Register of Historic Places
- Assisting the city, the state, or a nonprofit organization in the restoration of any historic building in the NHA

- Increasing public awareness of and appreciation for the natural, cultural, and historic resources of the NHA
- Assisting the state or city in designing, establishing and maintaining appropriate interpretive facilities and exhibits in the NHA
- Enhancing public awareness and appreciation for the historical, archaeological and geological resources and sites in the NHA
- Encouraging the city and other local governments to adopt land use policies consistent with the goals of the plan and to take action to implement those policies

Consistent with these objectives, Wheeling Heritage recently with assembled a Strategic Plan (2017-2022) as of November, 2017. The mission and vision outlined in the Strategic Plan has been reframed as that of a **“catalyst for the revitalization of Wheeling.”**

The strategic plan indicates that its mission as a “revitalization catalyst” will be accomplished by:

- Recognizing, communicating, and preserving Wheeling's heritage
- Focusing investments in the downtown and the riverfront areas
- Actively collaborating with others, including through public/private partnerships
- Engaging the citizens of Wheeling in projects, programs, and activities to the benefit of all

It should be observed that as outlined in the enabling legislation, National Heritage Area funds from the National Park Service for the designated Wheeling National Heritage Area are capped at one million dollars per fiscal year. The actual level of Heritage Program funding ranged from \$528,000 to \$1,000,000 per year. These funds required a non-federal match of 25%.

This level of funding is a considerable reduction in funding compared with the pre-NHA designation period when the Wheeling National Heritage Area Corporation received millions of dollars each year in earmarked funds. As a result, Wheeling Heritage has shifted its focus to collaborative efforts and public/private partnerships where the National Heritage Area is no longer the primary or major funder of new development efforts.

This has also led Wheeling Heritage to move away from major building and site restoration and to migrate toward more traditional or smaller scale programmatic activities involving preservation, interpretation, and education as well as modest grant-making in the community.

Given these conditions and the sun-setting of National Park Service funding, the Strategic Plan emphasizes the need for Wheeling Heritage to identify and build relationships with local, regional, and national funders which can continue to support its efforts as funding from the National Park Service winds down.

2.2.2 WNHA Organizational Structure

Wheeling Heritage is a nonprofit entity that manages the funds, personnel, and programs designed to fulfill the mission requirements set forth in the enabling legislation, Wheeling Heritage currently has five (5) full time equivalent, 4 full time, and 3 part-time employees.

The board of directors currently has members with a deep knowledge of all disciplines related to Wheeling Heritage activities, projects, and programs.

1. Full-time staff includes:

Executive Director

The Executive Director is responsible for overseeing the day-to-day operations of WNHA,

short and long-term strategy, fundraising, sustainability planning, and board and partner relations.

Program Manager

The Program Manager is responsible for overseeing arts and recreation programs, partnership grant-making, managing the Artisan Center, and the retail shop.

Project Manager

The Project Manager is responsible for a variety of historical, interpretive, and restoration projects for Wheeling Heritage.

Project and Outreach Manager

The Project and Outreach Manager is responsible for overseeing the community development and community outreach activities. This position is responsible for small business activities, public space planning, fundraising, and public relations.

2. Part-time Staff includes:

Retail Staff

Wheeling Heritage has a total of three part-time employees working as sales associates in the Artisan Center Shop. These positions are responsible for customer relations and sales.

3. Consultants include:

Accounting, Part-Time CFO

Wheeling Heritage has engaged an accounting firm for many years to act as not only the accountant, but as the part-time CFO. This consultant handles bill paying, tax filings, payroll, financial reports, financial projections, and financial analysis.

Graphic and Web Design

Wheeling Heritage engages a small local graphic design firm to handle all design elements for the organization including brochures, informational documents, logos, and the website.

Human Resources

Wheeling Heritage engages a human resources consultant to help ensure the organization is up-to-date on all human resources requirements, in compliance with laws, and is aligning staff toward the strategy outlined by the board.

4. Board of Directors

The board of directors includes a diverse team of 22 individuals with expertise in a number of key areas important to Wheeling Heritage. These areas of expertise include:

- Economic and community development
- Business management
- Board governance
- Architecture
- Construction and project management
- Finance and investing
- Federal, state, and municipal government
- Legal affairs, public and government relations
- Marketing and cultural tourism
- Fundraising and non-profit management
- Higher education and history

Board members have been active with Wheeling Heritage or its predecessor organizations for terms as brief as two months and as long as 13 years. Half of the board members have been actively involved for four or more years.

A detailed description of board membership is shown in Table 2-4 on the next page and outlines the length of time on the board, officer positions, committee assignments, and relevant areas of expertise.

Table 2.4: Board Membership Description

Wheeling Heritage Board Members	Time on Board	Office	Committees	Expertise
Arch Riley	13 Years	Chair	Executive	Legal, Finance
Stephen Johnston	3 Years	Vice-Chair	Executive, Nominating, & Governance	Business Community, Municipal Government
Wendy Scatterday	8 Years	Secretary	Executive	Architecture, Municipal Government
Craig O'Leary	4 Years	Treasurer	Executive, Finance & Audit	Project Management, Finance, Construction
Jay Frey	2 Years		Executive, Nominating, & Governance	Board Governance, Fundraising
Susie Nelson	5 Years		Executive	Fundraising, Nonprofit Management
Frank O'Brien	2 Years		Executive	Tourism
Joelle Connors	4 Years			Economic Development, Public & Government Relations
Russell Dunkin	3 Years		Finance & Audit	Finance, Investments
Glenn Elliott	4 Years		Nominating & Governance	Legal, Municipal and Federal Government
Jeanne Finstein	12 Years		Finance & Audit	Higher Ed., History
Wendy Hodorowski	Less than 1 year			Marketing, Development
Walker Holloway	1 Year		Nominating & Governance	Finance, Investing
Orphy Klempa	2 Years			County & State Government, Construction
Olivia Litman	5 Years			Tourism, Marketing
Michael Mistovich	3 Years			Finance
Zahra Mohebbi	2 Months			Cultural Tourism, Management
Loma Nevels	2 Months			Community, Community Development
Allison Skibo	5 Years			Marketing, Public Relations
Erikka Storch	4 Years		Finance & Audit	State Government, Business Community
Brian Wilson	2 Years			Municipal Government, Construction
Charles Wood	6 Years		Nominating/Governance	History, Building Development

2.2.3 WNHA Relationship with Partners

Wheeling Heritage has made collaborations with partner organizations the centerpiece of its overall community development strategy. In order to develop a clear picture of its partnerships, ARCBridge worked with Wheeling Heritage to develop a partnership database that captures data on each partner with respect to:

- Year first active with Wheeling Heritage
- Years active with Wheeling Heritage
- Whether or not the partner was a grantee
- Was the partner relationship formal or informal
- In which programs was the partner involved
- In how many programs was the partner engaged

Based upon these data, it was determined that Wheeling Heritage has maintained relationships with 173 active partner organizations. It needs to be recognized that Wheeling Heritage partners are organizations rather than individuals.

Given this organizational focus in a modest sized community with a population of about 27,000, ARCBridge believes Wheeling Heritage’s pool of 173 partners provide an extensive connection with individual members of the community.

Chart 2-1 below displays the growth in partnerships between 1990 and 2017.

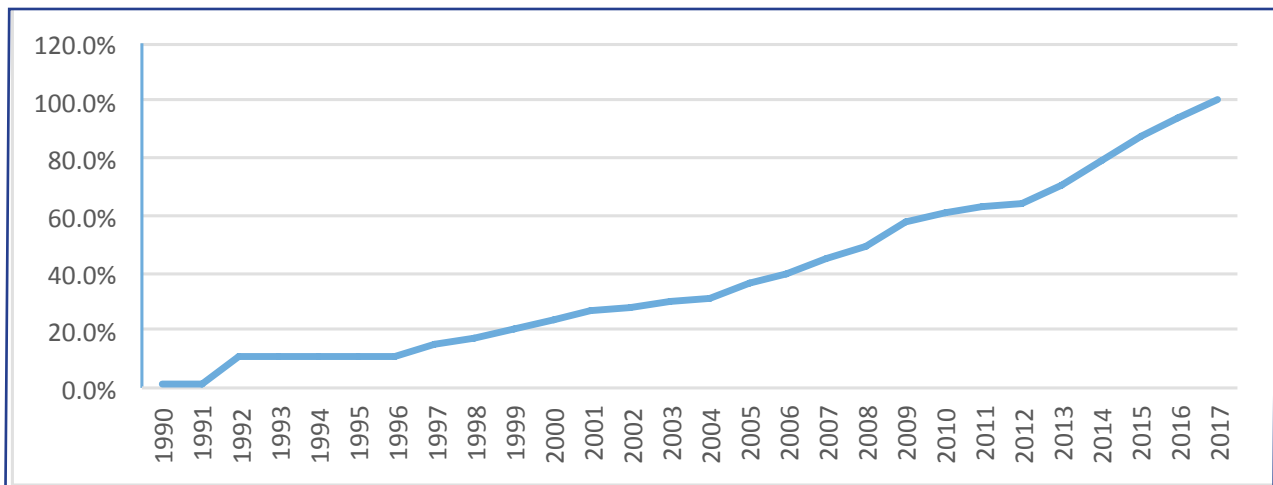


Fig. 2.1: Growth in WNHA Partnerships between 2000 and 2017

The chart shows that the rate of partnership growth increased substantially after the year 2000 when the Wheeling National Heritage Act of 2000 was authorized by Congress. This is indicative of the change in strategy from a situation where Wheeling Heritage (actually Wheeling National Heritage Area Corporation or WNHAC) shifted from earmarked funds to an NPS National Heritage Area funding cycle.

Strength and Sustainability of Wheeling Heritage Partnerships

There are a number of aspects of Wheeling Heritage’s partner relationships that are relevant to the strength and sustainability of those partnerships.

Along those lines, ARCBridge sought to understand how long those partnerships have been in place and found that the longer partners have been active with Wheeling Heritage, the more likely they will be to continue into the future.

In addition, the extent of involvement in a specific program is also an important indicator of the sustainability of partnership relations. Those organizations that have broader and deeper involvement with Wheeling Heritage reflect a deeper engagement with the NHA’s mission.

With this perspective in mind, ARCBridge first analyzed the partnership database to examine the length of the partner involvement with the Heritage Area as shown in *Chart 2-2 below*.

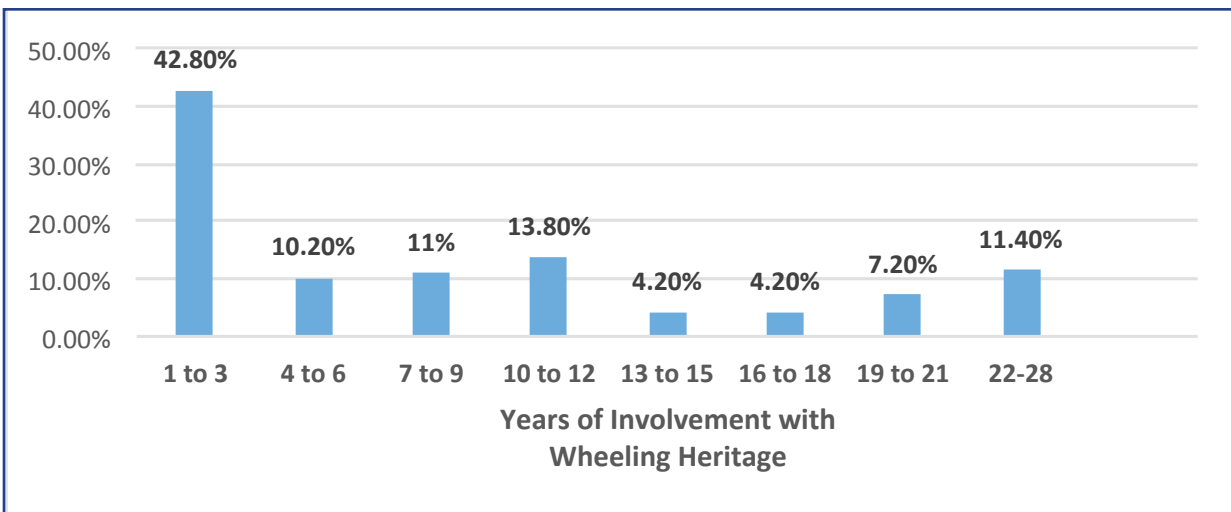


Fig. 2.2: % Partners by Years

As the chart indicates, nearly half (49%) of Wheeling Heritage partners have been active with the organization for six years or less. However, 51% of the partners have been active for 10 years or more indicating a particularly long-term commitment to the success of the NHA.

The chart reveals that more than half of the partners (56%) were only involved with a single program as part of their work with Wheeling Heritage. In addition, the data revealed that 26% of partners were involved with three or more discrete programs with the NHA; this suggests a broader and deeper commitment on the part of those multiple-program partners.

Next, ARCBridge examined the partnership data to determine how many programs each partner was engaged with. These results are shown in *Chart 2-3 below* and indicate the number specific programs in which each of the partners engaged with Wheeling Heritage.

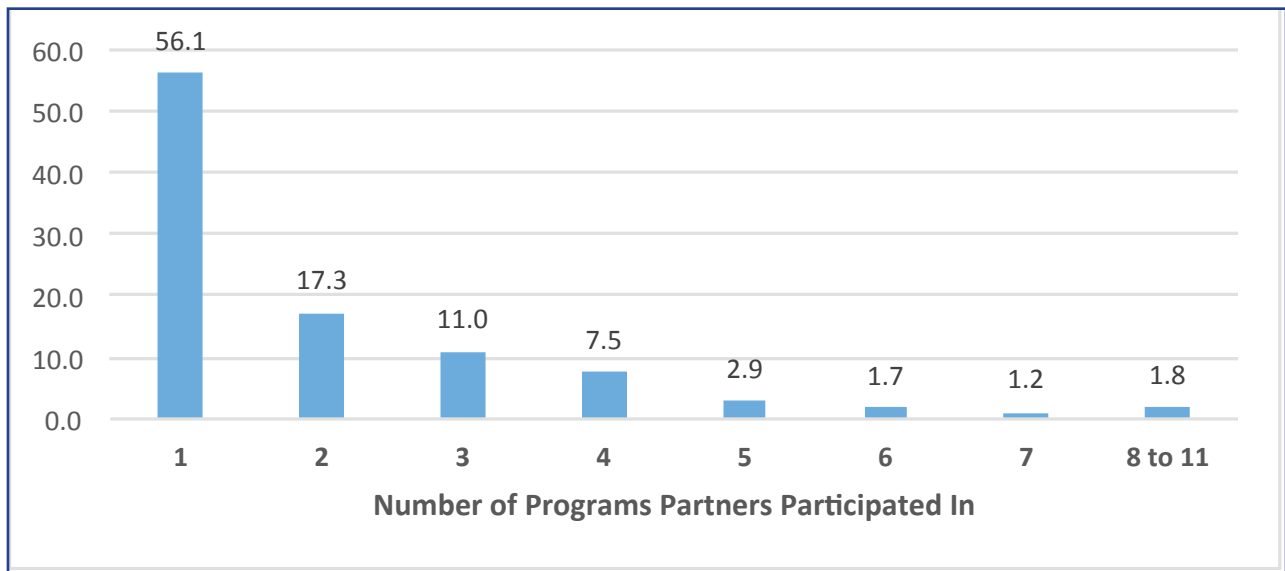


Fig. 2.3: % Partners by Program

2.2.4 Partner Outlook on WNHA

ARCBridge has found that Wheeling Heritage’s partners view the organization as having a central role in the areas of preservation, interpretation and economic development efforts. For example, ARCBridge spoke with Ken Peralta, Executive Director of WNHA partner organization **Grow Ohio Valley**, who placed great value on Wheeling Heritage for the following reasons:

- “WNHA is like a ‘blue chip’ organization, while Grow Ohio Valley is a start-up. It looks good for Grow Ohio Valley if a ‘blue chip’ organization is supporting a start-up.”
- “Wheeling Heritage is our partner—they were on the application for our start-up, then provided technical support, and put out the word on fundraising.”

Community Foundation for the Ohio Valley, which funds some of Wheeling Heritage projects also saw considerable value in the work of Wheeling Heritage. As Community Foundation Executive Director Susie Nelson put it:

- “You do programming in Wheeling, you run into Wheeling Heritage”
- “WNHA is the central hub”
- “Partnerships have increased largely because of WNHAC and have strengthened over the past 10 years”
- “Without WNHA, Wheeling would be a much colder, more detached place.”

ARCBridge’s interviews with partners also indicated that Wheeling Heritage frequently provides multiple kinds of assistance to partners in a given project. For example, the ARCBridge team met with Frank O’ Brien, the Executive Director of the Wheeling and Ohio County Convention and Visitors Bureau to discuss the multi million dollar renovation of the historic Capital Theatre in downtown Wheeling. During this discussion, the ARCBridge evaluation team discovered that Wheeling has been involved in the renovation of the theatre in multiple ways:

- “WNHA secured a \$80,000 grant from a foundation to carry out a feasibility study to define the risk of buying the theatre and addressing public safety issues.”
- “Wheeling Heritage’s role and reputation supported CVB in obtaining a loan for the renovation of the Capital Theatre – Wheeling Heritage’s credibility made that happen.”
- “They were also involved every step of the way and made me aware of ADA compliance issues (e.g. elevator to Ballroom)”
- “The theater façade needed stabilizing, Wheeling Heritage secured a Save America Treasures grant for the façade.”
- “We could not do the renovation without Wheeling Heritage—they brought a skill set of historic preservation and previous experience with other buildings that put us over the top.”

A similar picture of the multiple project roles and responsibilities taken on by Wheeling Heritage was provided to ARCBridge during discussions with Jeanne Finstein, President of Friends of Wheeling. Finstein noted that Wheeling Heritage co-sponsored the Preservation Forum with Friends of Wheeling and provided speakers for a number of presentations. In conjunction with preserving the Mt. Wood Cemetery, Wheeling Heritage provided mini-grants to support the touring operation. While partnering on 722-724 Main Street, Finstein pointed out that Wheeling Heritage played an important role by rehabilitating two Victorian building and assumed the largest burden of the renovation.

2.3 Chronology of the Development of WNHA

As described earlier in this section, there have been two major phases of development of the Wheeling National Heritage Area. In the first phase, funding for National Heritage Area planning and development occurred prior to the actual congressional legislation which designated Wheeling National Heritage Area.

This pre-designation period was occasioned by a high level of congressionally earmarked funding from the U.S. Department of Transportation and the National Park Service. The pre-designation period spanned the years between 1992 and the beginning of 2001. The second period of development encompasses the period after passage of the Wheeling National Heritage Act of 2000 (October, 2000) until the present day.

Pre-Designation Period

1990

- **\$175,000 in Federal funds were appropriated by the National Park Service in collaboration with the City of Wheeling to establish a commission to review the historic features of Wheeling for incorporation as a unit in the National Park System**
- **This led to a 1990 report recommending an integrated NHA**

1992

- **Plan for WNHA is completed and adopted by the Board of Directors**
- The Plan was the guiding document for creating the Wheeling National Heritage Area Corporation (WNHAC) and early projects

1993

- WNHA Interpretive Master Plan is completed and adopted by Board of Directors
- The Interpretive Plan continues to guide how Wheeling's history is interpreted

1994

- Wheeling National Heritage Area Community Venue Plans – completed and adopted
- **Wheeling National Heritage Area Corporation is incorporated** as a private non-profit community development organization
- First executive director, Charles Flynn hired
- Construction begins on Wheeling Artisan Center. The Artisan Center became a venue for the sale of locally, handmade arts and crafts and an anchor for downtown social gatherings and events

- Sasaki Associates of Boston, MA hired to create a master plan for the Heritage Port and waterfront redevelopment

1995

- Wheeling Heritage Challenge Grant Program launched; it was the first community grant program offered by the NHA
- Wheeling's Spoken History Project started, an oral history project that captured hundreds of hours of local history and resulted in an ongoing locally broadcast radio program
- The Heritage Lighting Program lighted the exterior of Capitol Music Hall
- Wheeling Heritage Trail supported by WNHAC programming in collaboration with the Heritage Trail Partners and the city of Wheeling

1996

- Nail City Brewery is opened at the Wheeling Artisan Center
- Wheeling Artisan arts and crafts retail shop and art gallery is opened
- "Made in Wheeling" Industrial Heritage exhibit is opened on the second floor of the Artisan Center
- Wayfinder signage and map program is implemented, providing directional signage throughout city for major attractions and venues

1997

- The Artisan Center third floor is opened as a Loft Gallery and Banquet space
- The inaugural Wheeling Celtic Celebration is held at the Wheeling Artisan Center
- **The Wheeling Heritage office is opened on the third floor of the Artisan Center**
- The Heritage Port Master Plan is unveiled by Sasaki Associates

1998

- **Robert C. Byrd Intermodal Transportation Center is opened** and is dedicated by Senator Byrd. The construction of the facility allows for the redevelopment of the Wheeling Waterfront into the premiere waterfront development in the State of West Virginia.
- **Wheeling Visitors Center and offices of the Wheeling Convention and Visitors Bureau is opened** at the Intermodal Transportation Center
- “Wheeling: Crossroads of America 1818-1865” exhibit is opened at the Wheeling Visitors Center
- Wharf Parking Garage removed allowing for the construction of Heritage Port
- Wheeling Heritage Octoberfest is held on 14th Street with brew pub
- Christine Villamagna appointed administrative assistant
- City of Wheeling, WNHAC receives a TEP/T-21 grant for Heritage Trail signage and map reprinting

NHA Designation Period

2001

- Wheeling Heritage contracts with Century Equities for outlet mall study and receives Benedum Foundation grant. Unfortunately, the Executive Director at the time co-mingled foundation grant funds with NPS funds in a single checking account and overspent the funds. This led to a termination of the project as well as the termination of the Executive Director. Wheeling Heritage then took out a loan to repay the lost funds and eventually repaid the loan.
- Wheeling Heritage begins the planning process for the Wheeling Victorian Outlet Center, known as the Wheeling Outlets.
- **Senator Byrd dedicates Wheeling Heritage Port**
- WNHAC receives TCSP (Transportation, Community and Systems Preservation) grant
- Elevated B&O railroad bed in Center Wheeling stabilized and rehabilitated
- Wheeling Heritage contracts for exterior rehabilitation of the Wheeling Stamping Building

2002

- Hydie Friend appointed executive director
- **The Global Operations Center of Orrick, Herrington & Sutcliffe, LLP moves to the Wheeling Stamping Building**
- WV Economic Development Grant Committee awards \$70M for Wheeling Outlet Project
- Victorian kitchen exhibit opens at the John List House in North Wheeling
- Update on the Management Plan for the Wheeling National Heritage Area undertaken

1999

- **Construction began on Phase 1A of Heritage Port**
- **Senator Robert C. Byrd dedicated the Wheeling Artisan Center**
- “West Virginia: Born of the Civil War” exhibit opens at West Virginia Independence Hall including a “Bridge Blast” celebration and the video documentary “Crossing Time – The Wheeling Suspension Bridge.”
- Wheeling Suspension Bridge was lit as a partnership project of WNHAC, the State of West Virginia and the City of Wheeling.
- **Construction of Phase 1B of Heritage Port**
- Façade Loan Program, a partnership of WNHAC and the City of Wheeling begins renovations of Wheeling Coffee and Spice Co., Egerter Building (Subway) and Laconia Building with the use of City CDBG funds
- Suzanne Quinn hired as executive director
- Ann Knight appointed Administrative Assistant

2000

- **Phase 2 of Heritage Port begins**
- **The Wheeling National Heritage Area designated by U. S. Congress**

2003

- Wheeling Heritage sponsors 7th Annual Wheeling Celtic Celebration at Artisan Center
- The Interpretive Grants Program is created and early awards include the restoration and display of Civil War battle flags at the West Virginia Independence Hall and the Bicentennial Commemoration of Lewis & Clark”
- The Heritage Area welcomes the NPS Tent of Many Voices – Lewis & Clark Bicentennial
- Wheeling Outlet project abandoned
- Lewis & Clark Re-enactments, “Guns, A Red Boat and Watermelons”
- Update of Management Plan continues
- Identity project undertaken to develop new logo and signage
- The Stone and Thomas Building is now the Stone Center and is home to Williams Lea and Wheeling Jesuit University programs, Wheeling Wholesale Grocery is now the Education Center for West Virginia Northern Community College, and Zarnit’s Grocery has become the Corporate Headquarters for Staley Communications. Reichart’s Furniture was partially rehabilitated, but was lost some years later to demolition after a water main break in the building (the Warwick China building was deemed unfeasible to rehabilitate at the time of the study).
- Jeremy Morris hired as Project Manager
- Wheeling Heritage Trail Map first published
- **Wheeling Interpretive Signage Begins**— Wheeling history is explored through massive signage panels scattered throughout the city, particularly along the Heritage Trail. These signs were written by local historians and explore the history of the Wheeling Suspension Bridge, Wheeling’s frontier landscape, and the many industries that built the city.

2004

- **Management Plan Update completed and approved by the National Park Service**
- Brent Carney hired as project coordinator
- Research and design of industrial and neighborhood wayside signs
- Interpretive grant awarded to Oglebay Institute for exhibit “Cheer for the Home Team”
- Judge Frederick Stamp awarded the “Friend of Heritage Award” for the expansion of the Federal Courthouse
- The signs were installed in August of 2005 and inspired people to learn more about Wheeling’s history
- Documentation of the Labelle Nail Factory begins
- **Heritage Port Phase 3 design and construction started**
- Community “stakeholders” talk to Clear Channel regarding the future of the Capitol Theatre

2005

- **Architectural Feasibility Studies Undertaken**—After completion of the Wheeling Stamping Project, there was great interest in the redevelopment of other major warehouse buildings.
- Wheeling Heritage invested \$54,000 in the architectural feasibility of five large footprint warehouses: Warwick China, Stone and Thomas Department Store, Wheeling Wholesale Grocery, Zarnit’s Grocery, Reichart’s Furniture.
- As a result of this study, four of the buildings were purchased, rehabilitated, and created or relocated jobs to Downtown Wheeling.

2006

- **Completion of Phase 3, restrooms and sidewalks at Heritage Port**
- Dedication of Walter Reuther Memorial
- WNHAC leads effort to evaluate the purchase, renovation, operation and management of Capitol Theatre
- Adaptive reuse studies of Paxton-Zinn building are completed
- Stone Center undergoes \$8M renovation, WNHAC assists with Historic Investment Tax Credits for project

2007

- Capitol Theatre closes and WNHAC continues efforts to evaluate the purchase, renovation, operation and management of the Capitol Theatre
- Cemeteries of Ohio County, WV Glenna Dillon, published
- Historic Stone & Thomas graphics installed in the Stone Center Main Floor
- Preservation of the Browne Brothers collection by local historian Margaret Brennan
- Partial Rehabilitation of Soldiers & Sailors Monument, Courtney Micker
- Wheeling Heritage advises on Historic Investment Tax Credits for Bennett Square (Wheeling Public Library)
- Rebekah Karelis hired as part-time archivist
- The Ellen Dunable postcard collection catalogued and archived. The collection now resides at Oglebay Institute
- Wheeling Heritage nominates Holloway Estate-Mt. St. Joseph to the National Register of Historic Places
- Wheeling Heritage underwrites Ohio Valley Heritage Radio Program – every Tuesday afternoon on WVLY-AM
- Wheeling Heritage co-hosts Preservation Alliance of WV Annual Conference meets in Wheeling

2008

- Published Wheeling, the Birthplace of the American Steamboat, John Bowman. In partnership with Wheeling Historical Society, underwrote the Upper Ohio Valley Historical Review
- Continued to provide staff to the Wheeling Historic Landmark Commission and technical support to owners of historic properties
- Wheeling Historic Gateway Signage Installed—Through National Scenic Byways grant the Wheeling Heritage created and installed gateway markers at the entrance of Wheeling's six most prominent historic districts

- The markers were designed and constructed to resemble the Labelle Cut Nail, as Wheeling was once known as Nail City. The seven foot cut nail is adorned at its top with a sign top-per icon distinct to each district. The six districts demarcated include Downtown, North Wheeling, Wheeling Island, Centre Market, Woodsdale-Edgwood. and National Road

2009

- Bekah Karelis hired as a full-time historian
- Capitol Theatre restoration began
- Wheeling CVB entered into a management agreement with the Wheeling Sports and Entertainment Authority to operate the operations of the Capitol Theatre
- **The Capitol Theatre is re-opened to a packed house full of local entertainment**

2010

- Jeremy Morris appointed executive director
- Wheeling Heritage receives Save America's Treasures Grant for Capitol Theatre façade, grant will restore terra cotta façade
- Wheeling Heritage and partners create First Fridays event in Downtown Wheeling

2011

- Wheeling Heritage partners with the City of Wheeling to nominate Wheeling as a WV ONTRAC community, a precursor to the Main Street Program
- Wheeling partners create the Wheeling Mobile smartphone application that puts city restaurants, hotels, and businesses at the tips of residents and visitor's fingers

2012

- Wheeling Civil War Smartphone Application available on Apple App or Google Play Store—Through the financial assistance of the West Virginia Sesquicentennial Civil War Commission, WNHA and the Wheeling Civil War 150 Committee created a smartphone walking tour application that interprets 22 Civil War related sites in Downtown Wheeling and surrounding neighborhoods. The site uses gaming technology that allows the user to scan the horizon with their smartphone and moving from site to site without the use of traditional maps or navigation. The application is enriched with audio descriptions of each site and video of historical re-enactments.
- Published *It's Wheeling Steel* (Wheeling Big Band Society) a comprehensive remembrance of the It's Wheeling Steel Program, broadcast from Wheeling and one of the top radio programs in the nation from 1936-1944
- Wheeling Heritage takes over the publication of *The Upper Ohio Valley Historical Review* which was a product of the Wheeling Area Historical Society, which disbanded in 2011. The Review is a scholarly journal dedicated to the history of Wheeling and surrounding counties and continues
- **West Virginia Statehood Celebration**—Wheeling Heritage co-chaired the Wheeling 150 Committee and led efforts to interpret the state's founding at West Virginia Independence Hall. Activities included historical re-enactments, educational lectures, and a sponsored poem "A Song for West Virginia by WV Poet Laureate Marc Harshman
- Wheeling National Heritage Area began fundraising and restoration of Mt. Wood Cemetery in partnership with the Friends of Wheeling and the Community Foundation for the Ohio Valley
- **Mount Wood cemetery is nominated and accepted to the National Register of Historic Places**
- Preserve WV AmeriCorps program begins. Wheeling Heritage funds two volunteers to work on historic preservation projects in Wheeling, Jake Dougherty and Joy Williams. Jake Dougherty focused on Downtown Redevelopment projects and supported the activities of Downtown Wheeling, Inc., while Joy Williams focused on South Wheeling historic property survey and National Register nominations

2013

- Wheeling Heritage co-hosts the West Virginia Association of Museums Conference in Wheeling
- Madonna of the Trail Restoration—through a National Scenic Byway grant and in partnership with the Wheeling Chapter of the Daughters of the American Revolution, Wheeling Heritage was able to restore the statue. A re-dedication ceremony was held in the summer of 2013

2014

- Wheeling Heritage purchases the historic Blue Church at 1206 Byron St
- Camp Architecture held in partnership with Belmont College
- Wheeling Heritage begins holding monthly volunteer workdays at Mt. Wood Cemetery

2015

- **Wheeling Heritage successfully writes and submits the nomination for Riverside Iron Works to be listed on the National Register of Historic Places**

- Wheeling Heritage receives the State Historic Preservation Office's development grant to address structural issues for the Blue Church
- The Francis H. Pierpont monument is erected outside of West Virginia Independence Hall after successful fundraising efforts by Wheeling Heritage
- Jeanne Finstein served as acting Executive Director from November, 2015 until June, 2016

2016

- Wheeling Heritage replaces the roof on the Blue Church after receiving the State Historic Preservation Office's development grant
- Wheeling Heritage holds first Mt. Wood Cemetery fundraiser book sale, a used and old book sale to benefit cemetery restoration efforts
- **Jake Dougherty is hired as current Executive Director of WNHA**

2017

- Alex Weld is hired as project and outreach manager
- Wheeling Heritage completes the LaBelle Nail Company's business document collection, which is now housed at the Ohio County Public Library

Section 3

WNHA Fulfillment of the Authorizing Legislation and Management Plan

3.1 Goals and Objectives of WNHA

The authorizing legislation for Wheeling National Heritage Area (WNHA) was enacted by the United States Congress in 2000 to highlight the unique contributions of the region in and around the City of Wheeling, West Virginia to national and world history.

The Wheeling National Heritage Act of 2000 was the result of a decade of efforts by the City of Wheeling, the State of West Virginia, and the National Park Service beginning with the creation of the Wheeling Heritage Task Force in 1990 to identify conservation opportunities. This task force produced the Wheeling Heritage Concept Plan and commissioned a Development/Action Plan to determine how to best tell the unique story of Wheeling Heritage, culminating in the establishment of WNHA.

Specifically, according to the Congressional legislation, the region remains an important resource for the Victorian culture in the United States. Wheeling served as the western terminus of the National Road in the early 1800s, was one of the few major inland ports during the 19th century, and played an important role in the industrial and commercial heritage of the country through the development of industries such as iron and steel, boat building, textile, glass, and tobacco manufacturing, and others. At one point 50% of all glass made in the US was produced in this region.

3.1.1 1992 Wheeling Management Plan

The Wheeling National Heritage Area was one of the first national heritage areas to complete a management plan and receive ongoing technical assistance from the National Park Service.

The 1990 Concept Plan for the Wheeling Area encouraged federal support for the effort to identify cultural resources and led to Congress appropriating funds for the development of a management action plan and other early initiatives, all which were outlined in the Congressional authorizing legislation.

Thus the 1st Wheeling National Heritage Area plan, approved by the National Park Service, was completed in 1992 and featured an inventory of the area's resources, recommended management policies, and set forth implementation goals for many large-scale projects. **The focus of the 1992 plan was Wheeling's waterfront and downtown and called for the creation of a Heritage Port that would serve as both interpretative and developmental infrastructure.**

The plan recommended a 10-year action agenda including the management structure and roles for WNHA, project costs, implementation responsibilities, and sources of funds. **Under the guidance of the Wheeling National Heritage Area Corporation, a number of large and small historic preservation projects described in the management plan were successfully completed, including the following:**

1. **Renovation of a historic warehouse into a restaurant/museum/retail area**
2. **Construction of a five-story Intermodal Transportation Center that includes a visitor center with interpretative exhibits**
3. **Implementation of the first phase of the Wheeling Heritage Port – a new focal point of the city and an attempt to renew river traffic back to downtown Wheeling**

- 4. **Renovation and lighting of a National Historic Landmark, the Wheeling Suspension Bridge**
- 5. **Development of interpretative exhibits at another National Historic Landmark, West Virginia Independence Hall**

3.1.2 WNHA Act of 2000

The Wheeling National Heritage Area Act of 2000 was originally introduced by West Virginia Senator Robert Byrd and formally passed in the 2nd session of the 106th Congress.

The previous decade of planning and the implementation of the large and small scale projects highlighted above were quoted as proof that the 1992 Management Plan goals were a success and promoted the case for the official designation as a National Heritage Area:

“Wheeling has been fortunate to have superb local leadership, community support, and ongoing technical assistance from the National Park Service. In addition, the funds appropriated by Congress have encouraged investment by the private sector as well as matching funds from the city and the state. In a relatively short amount of time, the work that has been done as a result of having a national heritage area plan and a commission to implement it has made a real impact on the preservation of the city’s cultural resources and in the quality of life that Wheeling area residents enjoy.”

--WNHA Congressional Act of 2000

This legislation formally designated the Wheeling National Heritage Area Corporation (WNHAC), a non-profit corporation chartered in the State of West Virginia, as the management entity for the heritage area. **It also recognized the 1992 Management Plan as the foundation document for the NHA. The following requirements were included:**

1. S. 2247 would provide the formal legislative charter for an NHA which is already established and has received support from Congress for the last decade through annual appropriations
2. WNHAC should implement and coordinate the recommendations contained in the August 1992 Plan for the Wheeling National Heritage Area to ensure integrated operation of the NHA and to conserve and interpret its historic and cultural resources
3. The legislation would authorize funding appropriated by Congress to be used by the WNHAC for such purposes as making loans or grants, paying staff, and marketing

The WNHA authorizing legislation defined the purposes for the designation as follows:

Key Goals included:

1. **Recognize the importance to the country of the history and development of the Wheeling area**
2. **Provide a framework to assist the city of Wheeling and other entities to preserve, enhance, and interpret the area’s resources**
3. **Provide limited Federal, State, and local financial assistance for planning and infrastructure**
4. **Provide for an economically self-sustaining National Heritage Area that is not dependent on Federal funding beyond its initial years**

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

The bill called for a cap on the funding designated towards the official NHA to be no more than \$1,000,000 for any fiscal year and not more than a total of \$10,000,000 over 15 years, with a 25 percent non-Federal match requirement, while majority of other national heritage areas are required to match 50 percent.

The authorizing legislation also recommended that the Wheeling National Heritage Area plan be updated and submitted to the Secretary of the Interior. Under a requirement to update the plan, WNHAC would review their original implementation agenda and projected capital costs and consider proposals for new partnership initiatives that may not have been included in the original management plan.

Updating the plan would provide a formal opportunity to take stock of past accomplishments, determine how community priorities have evolved, and assess how community support for the NHA could be broadened.

3.1.3 - 2004 Wheeling Management Plan

The Wheeling National Heritage Area Act required that the WNHAC, as management entity, submit to the Secretary of Interior a revised plan that would include:

1. A review of the implementation agenda for the heritage area
2. Projected capital costs
3. Plans for partnership initiatives and an expansion of community support

Following the Wheeling National Heritage Area Act of 2000, WNHAC staff and board prepared an updated Management Plan with assistance, guidance, review, and key inputs from National Park Service Staff. The core strategy outlined in the management plan was coined “The Preferred Alternative”.

The Preferred Alternative

The Preferred Alternative focuses on the Heritage Port and its Ohio River setting as the main visitor and interpretive venue within the downtown core. At the heart of this alternative is an attraction-based strategy that attempts to enhance existing visitation and create new visitor traffic by adding to the diversity and the interest of river-related attractions in Wheeling.

- 2004 WNHAC Management Plan

Key operational objectives of the 2004 Plan:

1. Economic Development

Strengthen economic development and preservation activities that could enhance the Heritage Port, Artisan Center, and Wheeling Stamping and provide a spark for development in the central business district and investments in new downtown developments.

2. Increased Tourism Benefits

On completion, the combination of Heritage visitors and attendees at Heritage Port events is expected to annually generate \$6M in visitor expenditures and some \$6.4M in expenditures by heritage visitors, accounting for \$124,000 in city and county taxes, \$1M in additional state taxes, and over 176 new jobs in the community.

3. Extending the Heritage Brand

Physical and programmatic linkages to extend the heritage brand, marketing, and event coordination efforts beyond town to forge partnerships with high traffic visitor destinations such as Oglebay Park and Wheeling Island.

4. Interpretation

Implementing a centralized approach to interpretation that will give visitors a complete historical picture incorporating the city’s many themes, periods, and resources through a landscape based outdoor overview interpretative venue, route markers on the riverfront, or by consolidating all materials into a central Visitor Center.

5. Resource and Organizational Sustainability

- Soliciting increased local involvement to build community support for WNHAC's mission
- Structuring organizational staff and board to capitalize on current and future opportunities
- Developing and expanding partnerships with private development and philanthropic entities, operators of recreational attractions, educational content providers, and preservation and non-profit organizations at the local, state, and Federal levels.

After meeting with the Wheeling Heritage staff and board, ARCBridge has designated Wheeling activities into three major themes across the organization and constructed a logic model. The three program areas include:

1. Arts & Recreation:

- To ensure that natural, historic, and cultural resources are sustained for future generations
- Major programs include the Capitol Theatre, Artisan Center, Partnership with the Oglebay/Glass Museum, artist workshops, the annual Celtic Celebration, Trek the Trail programming, and Partnership grants (Fairs & Festivals, Recreation, and artists grants)

2. Community Development:

- To ensure downtown revitalization is a top priority
- Historic Building Development assistance including: Feasibility Studies and National Register Nominations & Tax Credit Assistance
- Support, promote, and provide opportunities for heritage resources to be developed in a sustainable way to generate positive economic returns for the region
- Assist small local businesses with networking and grant opportunities
- Major initiatives include the Wheeling Stamping Building and the Show of Hands

3. Preservation & Education:

- To help preserve local landmarks, create museum exhibits, and educate the general public about the rich frontier and Victorian history of Wheeling
- Projects have included exhibits at Independence Hall, producing and installing interpretive signage across the city, acting as a general resource for history questions, publishing the Upper Ohio Valley Historical Review, hosting and partnering on educational workshops, preservation of historical sites like Mt. Wood Cemetery, Blue Church and 722 Main St., the installation and restoration of monuments, production of walking tours, and the creation of digital resources

WNHA leadership has told ARCBridge that WNHA focuses on thorough and comprehensive efforts towards preservation and community development with a goal of increasing the understanding of Wheeling's historical significance and increasing the economic opportunities for its citizens.

"While divided on paper, when the activities of these programs work in unison, they create an increased quality of life in a city with a strong sense of place."

-Jake Dougherty, Executive Director, WNHA

It is important to note that while there are three distinct themes for Wheeling Heritage programs, many programs overlap as WNHA attempts to focus on projects that can incorporate more than a single category.

Examples of overlapping projects include:

1. The Wheeling Artisan Center was a preservation project bringing community development to downtown and features the arts
2. Wheeling Stamping was a combination of community development and preservation

3. Capitol Theatre – a preservation effort spurring community development and supporting the arts
4. The Blue Church – is a preservation project in a highly distressed neighborhood that has been/ will be used as a community performance space
5. Show of Hands/CoStarters are community development programs seeking to develop entrepreneurs and small businesses to reutilize historic properties and many of those individuals are artists or artisans

The charts on the following pages (Fig 3.1-3.3) map out the logic model for WNHA, depicting the relationships between WNHA goals, resources, major programs, supporting programs, inputs and outcomes, as well as a current snapshot of the top projects based on WNHA funds and hours spent in FY17.

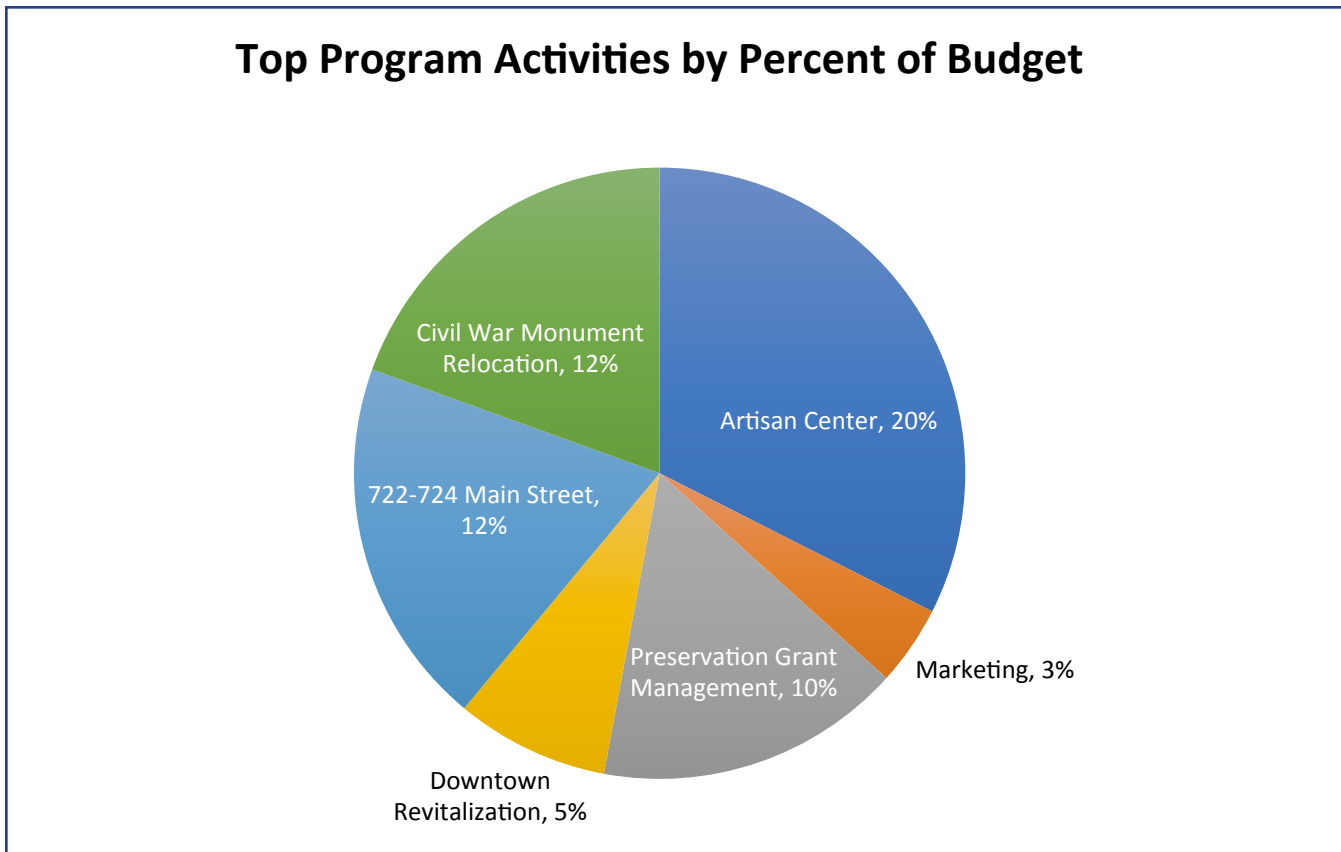


Fig 3.1: Current Snapshot: Top Program Activities by Funding in FY17

Fig 3.2: Logic Model

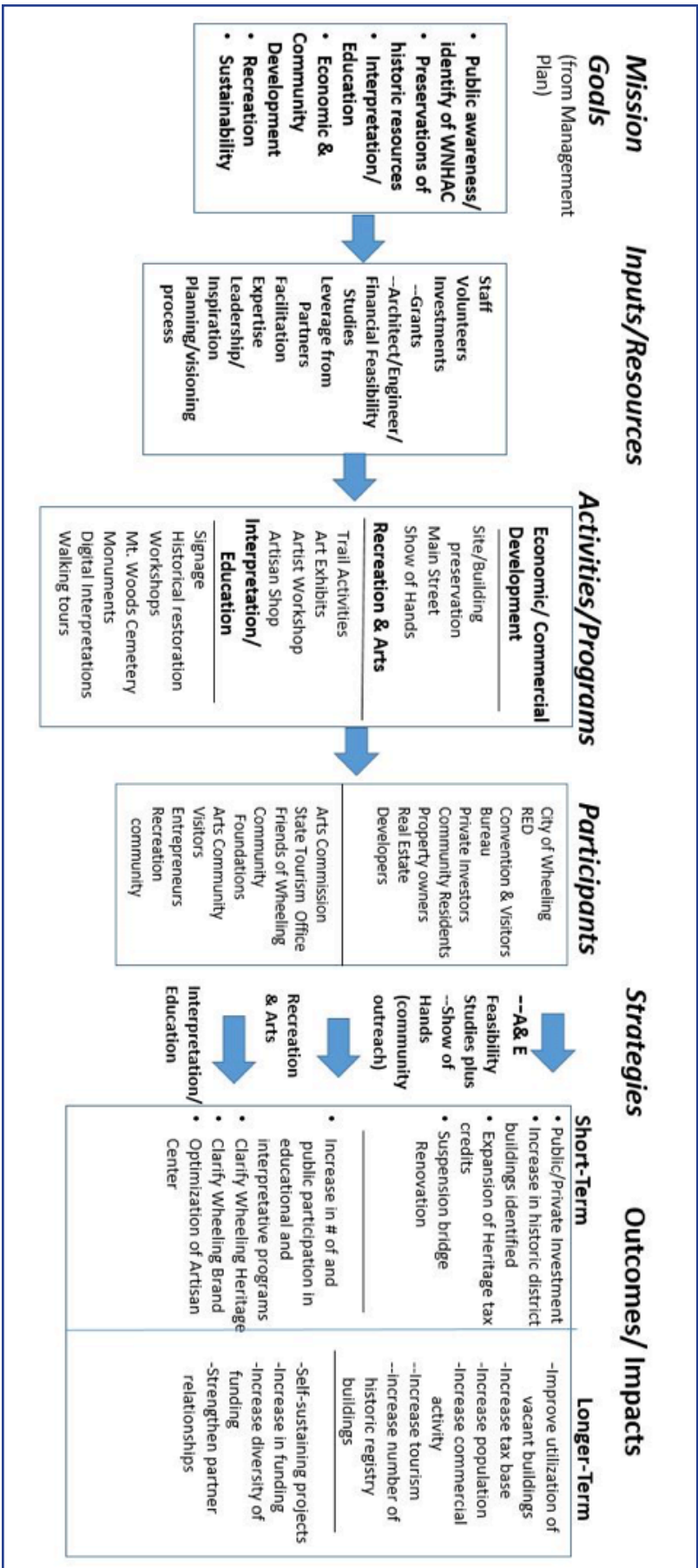




Fig 3.3: Current Snapshot: Top Program Activities by Staff Hours Spent in FY17

3.1.4 Initiatives Begun Prior to NHA Designation

Heritage Port

Prior to the heritage initiatives, the “wharf garage” occupied prime waterfront land and blocked access to the Ohio River. Demolition of this structure and creation of Heritage Port has dramatically changed the relationship between the City’s downtown and the Ohio Riverfront. Heritage Port events annually attract 250,000 – 300,000 visitors to a range of festivals and performances.

Artisan Center

The Wheeling Artisan Center, a renovated industrial structure consisting of three buildings, features a magnificent three-story atrium and skylight. The building, owned by the city, was rehabilitated by and with WNHAC funds and houses their offices. WNHAC holds a long-term lease and manages the property. The first floor is leased to a large brewpub restaurant where visitors can enjoy a taste of Wheeling’s heritage.

The second floor is devoted to the retail sale of unique West Virginia and regional arts and crafts and “Made in Wheeling” industrial heritage exhibits, including a full-size Mail Pouch sign painted by Harley Warrick. The top floor features the Loft Gallery with changing art exhibits and a large special events hall which is the site of the Wheeling Celtic Celebration, community events, and banquets.

Intermodal Transportation Center

This facility is an 850-space garage that was developed to replace the spaces lost by demolition of the garage that was removed as part of the Heritage Port project. This facility also includes the Wheeling Convention and Visitors Bureau (CVB), Visitor Center, and a transportation history exhibit.

Exhibits at WV Independence Hall

The Wheeling Custom House, which housed not only the U.S. Customs Service but also a federal courtroom and post office, is symbolic of Wheeling serving as a Port of Delivery and a transportation, commercial, and industrial center.

Constructed nearly six years before President Lincoln signed the proclamation making West Virginia the 35th State in the Union in 1863, the structure is known today as West Virginia Independence Hall as it was here that the state was formed. WNHAC is responsible for the installation of exhibits “West Virginia – Born of the Civil War” that interprets the complicated statehood story. The restored building is owned and operated by the West Virginia Division of Culture and History.

Wheeling Heritage Trail

This Trail, recommended in the 1992 Plan and principally implemented by the city, is a 13-mile bike and pedestrian facility that follows the east bank of the Ohio River passing along the edge of Heritage Port and along sections of Wheeling Creek to the east.

Wheeling Stamping

This former industrial building has been transformed into a global operations center for the international law firm of Orrick, Herrington & Sutcliffe LLP which currently employs over 350 local residents. Sympathetically rehabilitated to preserve its historic industrial character, the building is the first in a proposed redevelopment of the Celoron area into office and commercial uses, similar to the concept of the Heritage Research and Development Park recommended in the 1992 Plan. The alternative to this project was to do total demolition and none of Wheeling Heritage’s funds were used to demolish any property during this rehabilitation.

The project demonstrates a successful collaborative effort between WNHAC, the City of Wheeling, Ohio Valley Industrial and Business Development Corporation (OVIBDC) and other partners. Other interpretive improvements WNHAC has supported include interpretive installations at Centre Market and North Wheeling. The organization has provided a number of modest grants to local entities for interpretive, educational, and preservation purposes.

Additionally, WNHAC has provided technical and financial support for several other downtown initiatives. Starting during pre-designation and continuing today, Wheeling Heritage has secured local, regional, state, and federal funds, in addition to private funds, to provide support efforts for adaptive reuse of historic downtown structures as well as historically sympathetic in-fill and associated commercial uses.

3.2 Grants

Mission Statement:

To help accomplish the goals and objectives of the Management Plan, Wheeling National Heritage Area distributes grants to community organizations to provide and leverage funding for new projects across the region that preserve, interpret, and develop heritage resources and that expand economic opportunity.

“We are not capable of implementing all activities, so our goal with grant giving is to distribute leadership throughout the community. The funding helps to grow capacity in smaller organizations and encourage them to try new things.”

- Jake Dougherty, Executive Director WNHA

3.2.1 Overview of Grants

Between 2000-2017, WNHA has awarded 278 local grants totaling \$567,380.28 to 102 local organizations. Of the 102 organizations, nearly half (48%) have received more than one grant, while nearly a third (32.4%) have received more than three grants. Grants are awarded on a rolling basis with an average of 15 grants totaling \$28,822 funding dollars each year.

Table 3.1, on the next page, provides samples of some of the top grants awarded by WNHA based on analysis of resulting community impact and participants that were involved.

Grant Project Title	Grant Amount	Category	Year	Organization	Description	Annual Visitors
Mansion Museum Signage Enhancement	\$3,750	Preservation & Education	2005	Oglebay Institute	Updated signage for the Historic Mansion Museum	33,000
Ft. Henry Days	\$925	Fairs & Festivals	2002	Ft. Henry Living History, Inc.	Annual celebration of Wheeling's frontier heritage	3,200
Civil War Battle Flag Exhibit	\$15,000	Preservation & Education	2004	WV Independence Hall	Permanent Battle Flag Exhibit	5,547
Civil War Flag Film	\$1,000	Preservation & Education	2012	WV Independence Hall	Educational film to be used at WVIH	5,547
Vintage Raceboat Regatta	\$1,000	Fairs & Festivals	2006	Wheeling Vintage Raceboat Regatta	Festival at Heritage Port celebrating river heritage	3,000
Mahrajan Festival	\$1,000	Fairs & Festivals	2013	Our Lady of Lebanon	Festival celebrating Lebanese Culture	3,000
Greek Festival	\$1,000	Fairs & Festivals	2007	St. John the Divine Greek Orthodox Church	Celebration of Wheeling's Greek Heritage	2,500
Heritage BluesFest	\$1,000	Fairs & Festivals	2005	Heritage Music Inc.	Blues music festival on Heritage Port	2,000
Mountaineer BrewFest	\$1,000	Fairs & Festivals	2016	Valley Groove Productions	Festival at Heritage Port with local breweries	1,600
Heritage Trail Tour	\$1,000	Art & Recreation	2008	Ohio Valley Trail Partners	Bicycle Tour annual event promoting Wheeling Heritage Trail system	400

Table 3.1: Sample of Top Grants

Potential projects or events must fall within 4 key categories:

1. Arts & Recreation
2. Community Development
3. Preservation and Education
4. Fairs and Festivals

Fairs and Festivals grants is a special category that helps entities produce cultural festivals that utilize the Heritage Port and the river, one of Wheeling National Heritage Area's largest investments. Some of the festivals that have gotten consistent funding include:

1. Ft. Henry Days

16 grants of \$500-\$1000 each were awarded between 2002-2017. Fort Henry Days is an annual, multi-day event that tells the story of Wheeling's frontier heritage. Celebrations include a re-enactment of the last battle of the Revolutionary War, the Battle of Ft. Henry, drawing 3,200 attendees.

2. Greek Festival

10 grants of \$1,000 each were awarded between 2007-2017. This annual festival to celebrate Greek culture is hosted in the Centre Market area. Wheeling Heritage funds allow the festival to have Greek dancers and music. 2,500 attendees participate annually.

3. BluesFest

Five grants of \$1,000 each were awarded between 2005-2016. BluesFest is an annual, multi-day music festival on the Heritage Port that draws renowned Blues artists and tens of thousands of attendees from across the United States.

4. African American Jubilee

Eight grants of \$1,000 were awarded between 2000-2008. The African American Jubilee celebrates African American culture throughout the Ohio Valley and takes place at the Heritage Port.

3.2.2 Grant Evaluation Criteria

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

- Regional or multi-themed in scope
- Joint ventures and private/public partnerships
- Able to leverage substantial matches from project participants and other distributors

Grants are evaluated by Wheeling Program Manager, Chris Villamagna, and are open to individuals, community and neighborhood groups, local institutions, public entities and private enterprises. Joint ventures and private/public partnerships are encouraged and applicants need not have non-profit status.

However, applicants must demonstrate that they have the capacity to administer responsibly and account for funds, as grants will fund only up to 75% of direct project costs. The applicant can provide its matching share either in dollars or in-kind services.

Preference is given to activities that align with the Heritage Area Plan for interpretation or downtown and neighborhood revitalization. Applicants may apply for multiple grant categories as long as the total equals \$1,000 or less.

“Much of our grants program is reliant upon what our small city of 28,000 is able to generate. We provide grants to nearly all applicants and we advise them to speak to us before applying so we can provide them appropriate guidance.”

- Chris Villamagna, Wheeling Program Manager

For larger grants of up to \$15,000, recipients must sign a Partnership Grant Agreement which details requirements including:

1. The proceeds of the grant shall be used exclusively for the purposes set forth in the proposal. No part of the grant will be used for other purposes. The organization will promptly reimburse the Wheeling National Heritage Area Corporation for any portion of the proceeds of the grant not used for the purposes of the grant.
2. Recipients shall provide a 25% match for WNHA Interpretive Grant funds utilized and must provide suitable documentation.
3. Payments of the grant will be made upon receipt of this signed grant agreement letter and the submission of a Request for Funds form. Grant disbursements will be payable once every thirty (30) days upon the receipt of a Request for Funds form. Recipients must be able to account for the receipt, obligation, and expenditure of funds. WNHAC realizes that the project and organization may require some allowances in getting the project started, therefore a detailed budget for the use of the funds will be required.

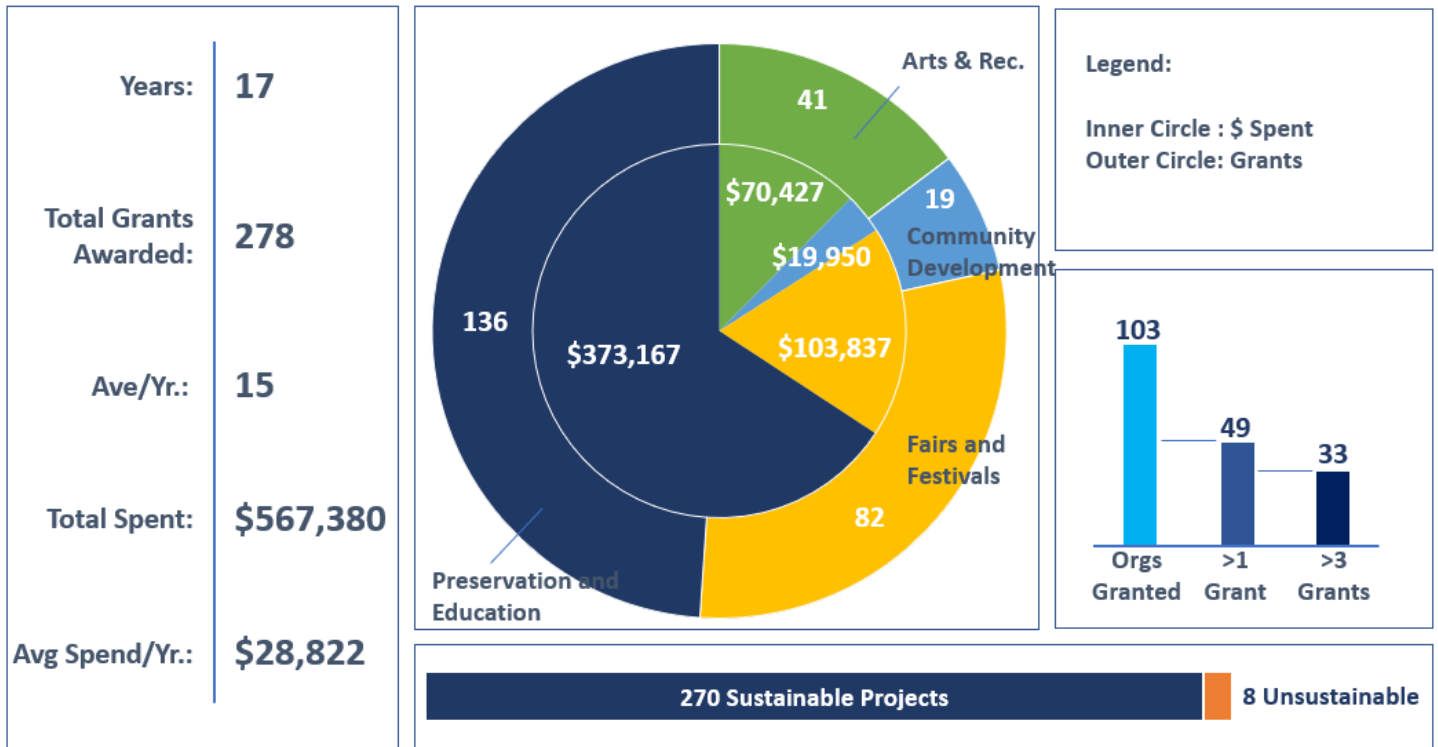


Fig 3.4: Grants Program Overview

4. Recipients will submit a Quarterly Status Report every three months until completion of the project. Within sixty (60) days after the completion of the project recipients will submit a Final Report.

5. All publicity regarding the project must state that funding was provided in part by the Wheeling National Heritage Area Corporation.

6. All products and printed materials must contain the statement, *“This project is in partnership with the Wheeling National Heritage Area Corporation and funded in part by the National Park Service, U. S. Department of the Interior”* and utilize the Wheeling Heritage logo.

7. All physical improvements will have an appropriate identification sign with the Wheeling Heritage logo.

Fig 3.4 (see above) provides an overview of the grants program along with key numbers.

3.2.3 Grant Analysis

ARCBridge has observed a great discrepancy amongst grant categories with 136 grants awarded to preservation/education projects, 82 to festivals, 41 to arts, and 19 to community development.

After looking through the 278 grant project descriptions and interviewing several recipients, ARCBridge has found that this is due to the fact that historical projects have been the most common long-term interest of the community organizations applying, resulting in the most grants awarded to preservation and educational programs.

Meanwhile community development grants have the least amount of grants awarded due to the fact that there are simply not a substantial number of organizations in the community development sector applying to WHNA’s grant program. It is a newer category with the bulk of grants being awarded after 2009.

ARCBridge believes that while WNHA has made significant strides in boosting preservation education projects around the community and contributed to a wide variety of cultural festivals that increase visitation to the region, there could be a more targeted approach to solicit interest from smaller arts and community development organizations or individuals in the future.

ARCBridge has also noted that nearly half of all organizations or entities who have applied have received more than one grant, while one third of all organizations have received more than three grants, which allows for WNHA to have a greater organizational impact on project recipients and foster stronger partnerships. This can be attributed to the fact that there are simply not a lot of organizations within the NHA.

ARCBridge believes the fact that WNHA has the capacity to award nearly all applications is beneficial in fostering community trust and respect for WNHA as a reliable source for funding all types of projects that fall under the heritage guidelines. This allows for more innovative ideas to be pitched and WNHA to serve as an incubator for launching new initiatives within existing organizations or allowing unique micro experiments a legitimate space to be tested out within.

As the same organizations keep reapplying year after year, WNHA is able to regularly monitor success rates of previous grants and use that information to decide whether or not a program has the potential to become sustainable and if federal funding is being put to best use. Fig 3.4 above gives a detailed overview of the grants program and key numbers.

Grant giving has allowed WNHA to further increase its brand awareness and reach throughout the community while serving as an incubator to test out new ideas and types of programs. WNHA emblem logo is included on all types of

project materials, websites, event brochures, handouts, and press releases.

The Wheeling Heritage staff are aware of all related events taking place and can ensure that WNHA gets the credit due and monitors the results of any grant or festival in real time. WNHA staff are also usually invited to ribbon cutting ceremonies and other program milestones and have been featured in dozens of media articles.

3.3 Arts and Recreation

The Wheeling National Heritage Area Arts & Recreation program has a mission to capture and demonstrate Wheeling's unique culture through various media, showcase past and present artisan work, and provide recreational opportunities to local citizens and the public at large so that more people are exposed to these resources.

WNHA has supported arts and recreation heritage preservation, interpretation, and development efforts by providing 41 arts and recreation grants to 15 local organizations since 2000, roughly 14.75% of the total 278 grants.

\$70,427 or 12.4% of federal funding set aside for grants was spent on sustainable projects promoting arts and recreational heritage, which include support for local concerts, arts institutions, and public lectures. In addition, several of the 82 grants provided exclusively for annual cultural fairs and festivals fall into the arts and recreation theme as well including the Heritage Music Blues Fest and the Ohio Valley Black Heritage Festival which highlights diverse performers and artists.

Here are some of the success stories of programs created that ARCBridge believes showcase sustainability:

1. Wheeling ArtsFest

Grant Recipient: City of Wheeling Arts and Cultural Commission

Grant Number: 7 annual grants of \$1000 starting in 2010 (\$500 in 2017)

Project: An initial \$1,000 grant was awarded to create an inaugural Wheeling ArtsFest

Sustainability: The Wheeling ArtsFest celebrated its 7th annual event in 2017 and has attracted more than 1,000 attendees and dozens of artisans each year since its inception.

2. Heritage Trail Tour

Grant Recipient: Ohio Valley Trail Partners

Grant Number: 10 annual grants of 1,000 starting in 2008 (\$500 in 2017)

Project: An annual bicycle tour that promotes the Wheeling Heritage Trail system

Sustainability: The Heritage Trail Tour has been growing every year with more than 400 participants.

3. Paint Historic Wheeling

Grant Recipient: Artworks Around Town

Grant Number: 1 grant of \$500 in 2013

Project: An event held in the Centre Market to promote interest in historic Wheeling through contemporary artists work

Sustainability: Dozens of national and international painters attended the inaugural event which is now held annually

4. A Song for West Virginia

Grant Recipient: Marc Harshman

Grant Number: 1 grant of \$1,000 in 2013

Project: WNHA commissioned West Virginia Poet Laureate and local Wheeling resident Marc Harshman to write a poem celebrating West Virginia heritage at the Sesquicentennial Celebration

Sustainability: This poem is now a part of Wheeling's preservation heritage

5. Summer Movie Series at Capitol Theatre

Grant Number: 1 grant of \$500 in 2017

Project: WNHA supported an inaugural summer film series at the historic Capitol Theatre

Sustainability: Over 1,000 visitors attended the summer series in 2017, allowing a new opportunity for people to learn about the historic Capitol Theatre and buy tickets to its live shows while also promoting traffic and concessions sales when more expensive live shows may not be playing. Given the high amount of interest, it is likely that this will become an annual event.

3.3.1 Oglebay Institute

WNHA's arts and recreation grants have usually been awarded in amounts of or under \$1,000 to support concerts, festivals, events, and lectures. The one exception to this general pattern has been major grants given to WNHA partner, the Oglebay Institute.

The Oglebay Institute is one of the oldest arts councils in the US founded in 1930. A multidisciplinary arts organization, it includes two museums, environmental education department, performing arts, and visual arts.

The non-profit Oglebay Institute has received six arts and recreation grants from WNHA since 2004 totaling \$35,084.

The Institute has also received eight preservation and education grants totaling \$24,107.

The Oglebay Mansion operated by Oglebay Institute houses the Oglebay Mansion Museum, dedicated to Victorian interior design, and the Glass Museum, dedicated to Wheeling-made glass. Both interior objects (textiles, pottery, furniture) and glass were manufactured in Wheeling during its peak industrial years.

The ARCBridge team met with Christin Byrum, Director of Museums and Holly McCluskey, Curator of Glass to learn more about the partnership with Wheeling Heritage, which has spanned over 40 events and activities over the past 15 years.

“Wheeling Heritage provides seed money to get projects off the ground. Once they are produced they have a longer life beyond these walls. The glass museum used to have half the numbers of the mansion museum and now it’s almost equal thanks to nearly a dozen exhibits that simply wouldn’t have been the scope and quality that they are without WNHA support. There are a lot of historic foundations locally but most are privately operated and they have their areas of interest. Wheeling Heritage is one place where we can go that has a dedicated interest in promoting our museums to support history and arts, otherwise we are up against a family foundation whose interests are more varied.”

- Christin Byrum, Director of Museums

Such activities have included helping in the promotion of the 400th anniversary of Shakespeare’s death to the cataloguing of thousands of historic postcards. WNHA has also provided grants for signage at the Mansion Museum and Glass Museum, which are usually visitors’ from around the country’s first glimpse into Wheeling’s manufacturing heritage. 33,000 people visit the Mansion Museum every year making it a critical partner in boosting awareness about WNHA activities in the region.

Oglebay Institute – Major Milestones

2004 – WNHA provides the Oglebay Institute with two \$15,000 grants, Cheer for the Home Team, related to Wheeling sports history, and the Glassblowing Mobile Unit

2005 – Wheeling Heritage provide approximate \$11,500 in grants to Oglebay, Institute for the Mansion Museum signage enhancements and the Appalachian Heritage Festival

2006 – Wheeling Heritage provides a partnership grant to American for the Arts project

2007 – Wheeling Heritage provides a partnership grant for Heritage Dance Association and Oglebay Institute partnership

2008 – Wheeling Heritage provides a partnership grant to increase Oglebay Institute’s organizational capacity

2010 – Wheeling Heritage provides more than \$18,000 for Hot Glass Road Show, educational trips for the mobile glassblowing unit, and Imagination Celebration, a one week celebration of the arts.

2012 – Wheeling Heritage provides partnership grant for Virginia Barger exhibit at the Mansion

2013 – Wheeling Heritage provides partnership grant for the photography of Wheeling

2014- Wheeling Heritage provides partnership grant for the performance of The Quiet Man at Towngate Theatre

2016 – Wheeling Heritage provides two partnership grants for Wheeling and the Bard interpretive panel and Nellie Krise Rare Book Collection interpretive panel

2017 – Wheeling Heritage provides partnership grant for the collection of the George Kossuth negatives.

One \$15,000 grant awarded to Oglebay in 2004 was to create a Glassblowing Mobile Unit where a master glass blower could visit schools and festivals to provide demonstrations on one of Wheeling's oldest crafts – glassblowing.

“The Glassblowing unit was one of our earliest projects we partnered on and it has really taken off. Glassblowing is truly a dying art. That people can see it in front of them....make their own paperweight. And the public can have a hands on experience in understanding how hard it is just to make a ball. It's all hand done. The projects they (Wheeling Heritage) have funded continue to have effects on the community. Shakespeare panels exist on their own. The sports exhibit went to the Wheeling Hall of Fame.”

- Holly McCluskey, Curator of Glass

A second \$15,000 grant was awarded in 2010 to promote Imagination Celebration, a weeklong celebration of Wheeling arts held across the city.

From visiting the Oglebay Institute, touring its museums, and interviewing key partner stakeholders, ARCBridge has understood that Wheeling Heritage is seen as the connector of numerous likeminded organizations in the community and despite the fact that there are many grant giving foundations, WNHA is unique in its targeted focus in promoting the arts as it pertains to Wheeling's heritage. WNHA's leadership role is vital in ensuring that all organizations are moving in the same direction and not overlapping resources.

3.3.2 Oglebay Foundation

Although Wheeling Heritage has focused its activities in downtown Wheeling, efforts have also been made to forge a strong partnership with the overall Oglebay Resort, which is a top tourism attraction in the region attracting millions of visitors annually. As the Oglebay Resort encompasses 1700 acres and includes on site activities such as a golf course and a zoo, Wheeling

Heritage and Oglebay have partnered on mutually beneficial ways to attract repeat visitation by advertising WNHA sites further downtown to tourists at the resort and even offering transportation to major festivals at the Heritage Port.

ARCBridge visited the Oglebay Foundation and spoke with its Chairman, Randy Worls a 4th generation Wheeling resident and WNHA Emeritus Board Member as well as current Oglebay Foundation CEO, Eriks Janelsins, to learn more about the decades long partnership between WNHA and Oglebay, which is the only self-sustaining park system in the US.

“My great grandfather was a steam ship captain from Wheeling and my family has had a long history in this town. I was the Volunteer Chair of Wheeling 2000. I have been involved with WNHA efforts since 1987. We were losing our major retail stores and wanted to rejuvenate the town by making it the first self sustaining NHA in the area. Oglebay has always been the main magnet for tourism for Wheeling. We wanted to send our guests downtown.

WNHA has done some big things, they're responsible for the Heritage Port, downtown water development, and the Robert C Byrd Intermodal Center. They created a plan that is still in place in downtown Wheeling to rejuvenate the downtown. Their fingerprints are on all the great things happening in Wheeling. Employees see Wheeling as an attractive place for families. Their influence has rejuvenated old buildings.”

- Randy Worls, Oglebay Foundation

Wheeling Heritage has been instrumental in bringing the Oglebay guesthouse, a historic building in the park, up to standards. WNHA staff helped secure the research and funding needed to do the proper feasibility studies to save and restore the building, which can now be rented out for weddings.

“For Oglebay to grow we needed partners around the city. We get 250,000 guests between the lodge and 54 cottages. There is no specific Wheeling piece and yet 15-20% of those people will find their way to historic sites. The Wheeling National Heritage Area has been the quiet initiator for many projects and very proactive. The more things there are to do in the area, the more people will come. All the special events and concerts...guests will tell us that they have seen the rejuvenation of Wheeling and it makes them want to come and do additional things and stay another night. One more night stay helps us so much as do the events WNHA produces at the Heritage Port.

We see heritage tourism becoming a bigger part of our tourism here. They have helped us seek funding and grants to do architectural surveys on the park, and to add places within the park onto the national historic register. I sit on a committee to map out the city and we look at WNHA for their technical advice and to help us understand funding opportunities. There are funding avenues they have access to that we do not. We get together 4-5 times a year with their executive leadership to brainstorm. How do we move guests around? How do we have every guest know about Wheeling? It’s so important to us to have them focus on the downtown.”

- Erik Janelson, CEO, Oglebay Foundation

From visiting the Oglebay resort, speaking to guests, and interviews with Oglebay Foundation leaders, ARCBridge has found that WNHA has been instrumental as a quiet but proactive guiding force behind the scenes in leading the charge to rejuvenate Wheeling and in attracting tourists from Oglebay to also visit downtown. ARCBridge applauds WNHA’s initiative in forging such a tight knit partnership that includes strategic meetings, technical assistance, historic building preservation consulting, and funding assistance to the region’s top tourist attraction and believes this strategy can be helpful in boosting overall tourism spending in the NHA.

3.3.3 Capitol Theatre

One of the largest arts restoration projects that Wheeling National Heritage Area has contributed to has been renovating the historic Capitol Theatre in downtown Wheeling. Originally built in 1928, the Capitol Theatre stands as an exemplary example of the architecture of the time and played a vital part in Wheeling’s economy and image to profit as a cultural hub for large-scale theatrical productions.

Over the years it became home to the legendary Jamboree USA and the Wheeling Symphony, but the building closed in 2007.

In 2009, WNHA partner, the Wheeling Convention & Visitors Bureau bought the building from Live Nation and began an extensive restoration project to bring the historic theatre back to life.

Supporting this project aligned with WNHA’s goals to revitalize downtown Wheeling and preserve historic buildings. **WNHA became a key partner, investing nearly a quarter, 22%, or \$804,641 of the \$3,625,743 in total investments given.**

Wheeling Heritage invested \$312,902.79 into the A/E fees, elevator, roof, and historic restoration/conservation activities between 2007-2011. Additionally, Wheeling Heritage received and managed the façade improvement, including a Save America’s Treasures grant, at a total of \$491,738.22 between the years 2012- 2016.

Capitol Theatre: Major Milestones

2007 – Capitol Theatre closes. WNHA initiates meetings of stakeholders to reopen the theatre.

2007-2008 – Wheeling Heritage has architectural drawings and economic impact reports conducted.

April 2009 – Capitol Theatre is sold to the Wheeling Convention & Visitors Bureau for \$615,000

September 2009 – Capitol Theatre reopens

November 2015 – Façade Restoration Complete

The ARCBridge team visited the Capitol Theatre during both the initial meet & greet visit for a full tour of the theatre, and during the second survey visit to observe a public performance produced at the Capitol Theatre. ARCBridge staff also interviewed the Executive Director of the Wheeling Convention & Visitors Bureau, Frank O'Brien, as well as season pass members.

Although there were several key stakeholders involved, ARCBridge believes that the Capitol Theatre restoration could not have been possible without the historical expertise and funding provided by Wheeling Heritage.

WNHA funded the initial Architectural and Building Code Assessment and offered invaluable guidance on proper restoration practices.

Wheeling Heritage led the construction management, grant seeking and administration, and archived documents at the theatre. This project took up a substantial amount of time and resources during its rehabilitation and Wheeling Heritage managed more than \$3 million of rehab in this property.

Since reopening in September 2009, a total of 463,959 patrons have attended 72 Wheeling Symphony concerts, 42 professional touring Broadway Musical productions, and concerts and shows by celebrities including Jerry Seinfeld and B.E. Taylor.

Survey interviews of Wheeling Symphony and Broadway show patrons indicate that 70% dined out before or after a show, with Americans for the Arts projecting that an average of \$13.50 is spent per person on food and drink in local establishments.

The projected impact of these performances is \$750,000 on the local economy.

After observing the crowds at a major Broadway production in the 2,400 seat venue and finding the theatre to be almost full, concession stand lines streaming out the door, and the streets post event to be brimming with cars and people headed elsewhere in Wheeling, ARCBridge can attest to the economic impact that the Capitol Theatre has on downtown Wheeling and its image as a cultural hub past and present.

3.3.4 Signature WNHA Arts Programs

In addition to grant giving and forging partnerships with arts institutions and recreational tourism attractions, Wheeling National Heritage Area has also been instrumental in producing several signature events for the Wheeling region. Of the top seven signature initiatives highlighted by WNHA leadership, three fall into the arts and recreational theme including:

Celtic Celebration

The annual Celtic Celebration draws nearly 2,000 attendees to the Artisan Center the first Saturday in March. The day is filled with Celtic music, dancers, food, and vendors to draw attention to the Celtic heritage of many in the Wheeling area.

Trek the Trail

Wheeling Heritage produces several events on the 13-mile trail system in Wheeling to encourage citizens to be more active. This program has existed for four years and consists of programs like Yoga on the Lawn, Walk with a Historian, the Soup Stroll, and Winter Fun Walk.

3.3.5 Artisan Center

Possibly WNHA's biggest signature program revolves around the Artisan Center.

Year	Retail Sales	% Change from Previous Year
2000	\$83,272	-
2001	\$82,574	99%
2002	\$84,849	103%
2003	\$90,364	106%
2004	\$89,388	99%
2005	\$84,221	94%
2006	\$80,497	96%
2007	\$86,916	108%
2008	\$75,830	87%
2009	\$59,655	79%
2010	\$60,579	102%
2011	\$58,084	96%
2012	\$60,236	104%
2013	\$68,352	113%
2014	\$53,379	78%
2015	\$51,681	97%
2016	\$55,245	107%
2017	\$61,888	112%

Table 3.2: Annual Artisan Center Sales

The Artisan Center was rehabbed in 1996 and converted from three underutilized buildings to one building operated by Wheeling Heritage.

The building includes a restaurant, office space, a retail shop for featuring 150 local artisans (operated by Wheeling Heritage), exhibition space for local artists (operated by Wheeling Heritage), a banquet space, and the Wheeling Heritage offices. Wheeling Heritage has made leasehold improvements in the property of more than \$5M.

WNHA staffers have told ARCBridge that operating the three-story building and utilization of the space as a regional artisanship and exhibit space are critical to WNHA and its role in the arts. WNHA staff run the retail store on the 2nd floor and exhibit space on the 3rd floor, which requires roughly 20% of the annual NHA budget.

"We use this space for interpretive exhibits that show wheeling's industrial heritage, it's a way to bring people in to learn a bit of history and support artists. We are a great engine for local artists to keep their art in the community, if you lose the arts in the community you lose your soul."

- Chris Villamagna, WNHA Staff Member

There was a steep decline in sales between 2008 & 2009 and since 2009 sales have been relatively flat (see Table 3.2 above). The percentage column shows the sales change from the previous year. There is not an identifiable reason for the change between 2008 and 2009. WNHA believes it is a "market correction" given the relative steady sales prior to 2008 and after 2009, although at different levels. Staff stated that they have seen increases over the last two years, and see signs of a good year in the current fiscal year.

Artisan Center Major Milestones

1996 – The Artisan Center opens. The 1st floor is the home of Nail City Brewery. The retail shop opened on the 2nd floor, featuring a “Made in Wheeling” Industrial Heritage exhibit. The 2nd floor is also the home of the Wymer General Store Museum.

1997 – The 3rd floor of the Artisan Center opens. The 3rd floor features a gallery and banquet space, as well as the home of the Wheeling Heritage offices. The 3rd Floor Loft Gallery continues to host a minimum of eight art exhibitions yearly. River City continues to use the banquet space for many events on a weekly basis, especially weddings.

1999 – 1st floor restaurant Nail City is assumed by River City Ale Works. River City Restaurant continues to operate

2001 – Renewal of lease between Wheeling Heritage and River City Ale Works

2002 – The newly created Children’s Museum of the Ohio Valley moves into the space previously held by Wymer’s General Store Museum. The space acts as an incubator for the Children’s Museum. The first exhibit they host on loan from Pittsburgh is Mr. Roger’s Neighborhood. The museum remains in the Artisan Center until fall of 2005 when they move to their own location.

2008 – 2nd floor space was divided with the retail shop retaining more than half of the space and new tenant, Comcast Spotlight, moving into a built out office space. This provided Wheeling Heritage with an additional tenant and additional rent money. The retail shop continues supporting local artists by selling their work. After net sales decreasing, the net sales profit has been increasing over the last three fiscal years.

2011 – Renewal of lease between Wheeling Heritage and River City Restaurant

3.3.6 Arts Analysis and Conclusion

After careful analysis of WNHA’s various arts and recreation programs, grants, and initiatives, ARCBridge has found WNHA has been successful in fulfilling the 2000 Authorizing Legislation goals of recognizing the history of Wheeling and its importance in the nation, providing framework to enhance, and preserve important resources, and offering financial assistance for infrastructure.

The Capitol Theatre and Artisan Center downtown highlight Wheeling’s rich history in the arts while the nearly a dozen arts fairs and festivals acknowledge the town’s rich heritage with WNHA financial support continuing to preserve and enhance these resources through continued grants and/or hands on leadership coordination. Meanwhile forging partnerships with the Oglebay Institute and the Oglebay Foundation have also fulfilled key goals in the updated 2004 management plan of increasing tourism opportunities by allying with the largest tourism attraction in the region and extending the heritage brand of the NHA through marketing and coordinating events at the Heritage Port. In particular, Wheeling Heritage’s hands on leadership in revitalizing the 2,400 seat historic Capitol Theatre was very impressive and showcases the ideal mix of the three themes of arts and recreation, community development, and preservation and interpretation.

3.4 Community Development

The Wheeling National Heritage Area Community Development program has a mission to act as a catalyst for revitalization while encouraging the preservation and reuse of Wheeling’s extensive collection of historic buildings as well as other resources. Community development is a broad bucket that includes overall promotion of the NHA for economic activity and historic building development assistance, as well as small business & entrepreneurship assistance and public improvement community meetings.

Wheeling National Heritage Area has supported community development efforts by providing 19 grants since 2001, roughly 6.8% of the total 278 grants. \$19,950, or 3.5% of total federal funding allotted to grants was spent on projects promoting community development. (Approximately 95% of HPP funds are not allocated to grants, while 5% have been. \$567,380 has been allocated to grants since 2001, from a total of \$11,285,958 received in HPP funds since 2001.)

It is important to note that community development is a newer grant category with the bulk of grants awarded after 2009 and mainly focusing on downtown beautification projects and community gardens.

Here are some of the success stories of programs created that ARCBridge believes showcase sustainability:

South Wheeling Community Garden

Recipient: South Wheeling Preservation Assn.

Grant Number: 1 annual grant of \$1000 in 2016

Project: The grant allowed proper gardening supplies to be purchased for the community garden

Sustainability: Since 2016, 50 community members have rented garden space.

City of Lights Program

Recipient: Wheeling Chamber of Commerce

Grant Number: 3 grants - \$5,000 in 2001, \$250 in 2014, and \$500 in 2015

Project: These grants were a part of Downtown Wheeling beautification efforts to create a holiday light program.

Sustainability: The Holiday Light Program is self-sustaining with no further assistance needed

3.4.1 Grow Ohio Valley

Recipient: Grow Ohio Valley

Grant Number: 5 grants of \$1,000 between 2009 and 2016

Project: Many of Wheeling's neighborhoods are food deserts and many have unutilized lots. Grow Ohio Valley, which started as East Wheeling Community Gardens, fights food insecurity and utilizes these vacant community lots. Starting in 2009 WNHA assisted in building community gardens and a greenhouse that produces food for more than 100 Community Supported Agriculture subscribers, and created a mobile gardening tool lending library as a community resource.

Sustainability: The initial garden thrives and newer gardens have been established, allowing partner Grow Ohio Valley to increase production of organic produce and herbs. The Tool'brary has been completed and provides resources for local neighborhoods. Grow OV operates multiple gardening sites, education programs, a Community Supported Agriculture (CSA) program, and is preparing to launch a year-round public market.

Grow Ohio Valley is a key indicator of how WNHA operates its community development grants. WNHA's initial grants helped to get Grow Ohio Valley off the ground, and now continues to help launch offshoot programs by providing initial seed money through annual grants.

ARCBridge believes that the WNHA grants model of incubating new organizations through grants and supporting their growth is a great way to build a variety of concentrated community organizations, as there are not very many currently in business that are applying to the WNHA grants program. There is an opportunity for WNHA to expand its reach into smaller subjects within Wheeling to offer additional micro grants to local businesses and individuals with ideas on how to preserve Wheeling's heritage and involve the local community.

3.4.2 Historic Building Development

Wheeling Heritage is continually providing historic property assistance that includes feasibility studies, design support, historic district nominations, and tax credit assistance. **Most notably, Wheeling Heritage invested \$54,000 into feasibility studies demonstrating the potential of four properties including the Stone Center, WV Northern Community College Education Center, Staley Communication, and the Paxton-Zinn Building. Since the feasibility studies were conducted, more than \$17 million have been invested in these buildings, making it one of WNHA's big impact projects.**

1. The Stone Center is a multi-story mixed-use development housing Wheeling Jesuit University's Physical Therapy program, nearly 500 professional jobs at Williams Lea TAG (an international business service provider), and 22 market-rate apartments
2. WV Northern Community College Education Center is an addition to the college's campus providing a culinary arts center and event space for the college's programs
3. Staley Communications was an industrial warehouse converted into the corporate offices of a communication company
4. The Paxton-Zinn Building is a three-story building adjacent to the Capitol Theatre that is now being used as a commercial space

3.4.3 National Register Nominations

As part of its mission to preserve the historic integrity of the local community, WNHA works to make sure that essential resources (particularly financial) are available to citizens. WNHA staff lead initiatives to get local historic sites national recognition by designating them as Historic Districts or Individual Listings on the National Register of Historic Places. This designation provides more resources to the property owners to rehabilitate buildings to the Secretary of the Interiors Standards for Rehabilitation. One of those resources is the Federal Historic Tax Credit.

WNHA also created a companion state tax credit and works with property owners to help them understand how to use the credit. Currently WNHA is surveying two historic districts, two individual listings, and one nomination, as well as many historic tax credit projects.

3.4.4 Heritage Port

Dedicated in 2001, the Heritage Port opened up Wheeling's riverfront and provided a new view of the Ohio River. The Heritage Port was more than \$4 million investment that created a new appreciation for the river and an event space for the community to use. The Heritage Port continues to be a key venue for interpreting Wheeling's history and WNHA hosts many of its community events and festivals at the Heritage Port.

ARCBridge spoke to Debbie Joseph, the organizer of a Regatta race that is one of the best vintage boat events in the country and which has become the premiere free event using the river and Heritage Port with thousands of spectators. 15,000-20,000 visitors come by special shuttle from the Oglebay Resort alone through a partnership with the Wheeling Convention & Visitors Bureau and WNHA.

"We are a fifth generation Wheeling family with a deep connection to boats - at least two of our relatives were on the Mayflower. WNHA was supportive of our desire to showcase vintage boats on Heritage Port and gave us guidance on funding and assisted in connecting us with so many city resources. Without them we would never have gotten off the ground. They connected us with local glass artisans so that we could give our participants from around the country gifts that showcase Wheeling's unique history. WNHA has been tremendous and very energetic in their support. We've had 12 years of successful regattas and want to continue to partner with them to advertise the Wheeling Heritage Port."

-Debbie Joseph, Regatta Organizer

3.4.5 Show of Hands

Arguably WNHA'S most recognizable event at the moment, the Show of Hands uses donations from attendees and sponsorships to provide community-directed grants to businesses and community projects. Held 3-4 times a year, the Show of Hands solicits proposals from small businesses and community groups who are looking for funding. Those chosen pitch their project at an event where hundreds of community members attend and vote on their favorite project. The five-dollar entry fee per person is then awarded to the winner to be used to fulfill their project goals.

To learn more about the impact of Show of Hands on the local Wheeling small business community, ARCBridge met with Carrie Eller, Owner of Under the Elder Tree, a wellness store located in the center of downtown across from the historic Wheeling Centre Market.

"I am trained in massage therapy and always wanted to open my own store. I would have not been able to do this in Virginia Beach where I used to live, and I saw Wheeling with new eyes – its affordable and espouses hometown values.

I started off with a very tiny shop in 2013 and since my store has been built by Wheeling and the Show of Hands community grant – we have grown organically into the premiere healing arts center in Wheeling.

In 2014 before my birthday, my initial shop got broken into and all my money was stolen - my month's intake. I had nowhere else to turn and so I applied to WNHA's Show of Hands contest.

I wanted to expand to build another therapy room (only had one) and recoup and build more shelving, and bring another therapist. I was going up against another retail shop that needed new lighting, a restaurant needed a cooler, etc.

You get 4 minutes to talk and pitch it to the crowd. It was so nerve-racking. I practiced a lot. Everyone knows Show of Hands through Facebook so I marketed a lot so my clients could come to the audience.

At that time it was in the largest crowd in attendance - a few hundred. It's a fantastic meet and greet - appetizers, food. There are a couple sponsors who donate to the fund, and people pay \$5 to enter, the amount goes to the winner, so the amount fluctuates depending on the crowd size. You know going in that it's a base of \$1,000.

I won \$2,150. I was amazed. Ecstatic. Happy as heck! It felt so good the community rallied behind me! "I love what Wheeling Heritage is trying to do. I go to every single Show of Hands event. It's a great networking community that includes all of Wheeling's movers and shakers. It's a good way to keep in touch with what's going. I tell everyone to try it. If nothing else, even if you don't win, you get amazing exposure - advertising, networking, you come with a bag full of business cards.

WNHA's Show of Hands was the impetus to expand, the stepping stone for me. Our sales have increased five fold and we are now open six days a week with four therapists servicing over 600 clientele for body therapy.

"WNHA has assisted in so many ways - I am now trying to buy the building and they have been working with me and being there for questions... it was the beginning of a relationship and they have brought me back to do follow-ups."

- Carrie Eller, Show of Hands Winner

ARCBridge also spoke with community business leader and Show of Hands patron, Debbie Joseph to learn more about the community impact.

“We started coming to the events and loved the concept. There is such an excitement in the air. A huge percentage of the crowd is young people. We call ourselves the Friends of Show of Hands. There are about 7-8 regular donors and we give \$250 about four times a year. This program has helped so many small businesses like a local yoga studio, recycling center, a framing business. It’s part of who we are here. It’s a miraculous event, they give a presentation and can walk out with \$4,000. That goes such a long way for a struggling start up. Even those who don’t win or who are even attending get the chance to network and brainstorm about business issues and Show of Hands allows them to have a forum to ask questions about applying for a non-profit, how to find an accountant? This just doesn’t happen in a lot of cities. WNHA is a true gem.”

-Debbie Joseph, Show of Hands Patron

After speaking to Show of Hands winners and community patrons to see the impact firsthand, ARCBridge commends WNHA on a very innovative project that has allowed for community growth on a grassroots level and that is not only attended by several hundred locals, but has been called a “miraculous gem”. ARCBridge believes the democratic nature of this WNHA signature event – in allowing community members to vote on funding to give to local businesses, has allowed WNHA to become a true leader in the local community and to promote projects that will help extend the heritage brand and foster further economic support.

3.4.6 Wheeling Stamping Building

WNHA was a key community partner involved with turning the 100-year-old Wheeling Stamping Building, one of the oldest manufacturing buildings in Wheeling into a sustainable office for one of the largest law firms in the world, Orrick. Cities around the U.S. sent bids and with the assistance of WNHA, the downtown waterfront property was chosen as the site of Orrick’s Global Operations Center, allowing for an influx of new jobs and development.

Participating in this development allowed the project to come to fruition and directly created 400 jobs while providing a sustainable revenue stream for Wheeling Heritage.

One of WNHA’s earliest community development and building restoration projects after becoming officially designated as a NHA, Wheeling Heritage and partners begin restoration of the Wheeling Stamping Building in March 2001. Wheeling Heritage invested \$1.8 million into the elevator, roof, and other structural elements of the building.

A year later in 2002, Orrick opened its offices in the Wheeling Stamping Building.

ARCBridge visited the four-story Orrick Global Operations Center within the Wheeling Stamping building twice, during the initial meet and greet visit for a tour, and later for a more in-depth look at the impact of WNHA on local businesses by talking to key Orrick leadership.

“People come to work in our Wheeling office and they want to stay. In 2002 we started with 73 employees and now we have over 300 (60% living in Wheeling) with a retention rate of under 10%. If it weren’t for WNHA we wouldn’t have a roof or a structurally sound building. They advised us to keep the original stamping logo. Our San Francisco headquarters have our staff looking for 500 square foot homes for \$2,500, here in Wheeling you can get a 2,500 square foot home for an \$800 mortgage. So when we have our leadership from New York City or San Francisco come to Wheeling, they are in awe. We have great schools, heritage, a waterfront, and a symphony. It’s small town, and it pays well. Why not come here? You can have a life. We trust WNHA. We see what they are doing in the community. They have lent validity to many of the projects locally and it makes the next project easier if people know they are working on it.”

-Steve Johnston, Business Continuity Coordinator, Orrick

By talking to key leadership at Orrick, ARCBridge has learnt that in assisting with the conversion of the old Stamping building into a modern office space, WNHA has not only fulfilled its core mission of progress through preservation, but also gained a valuable ally in the business community. Orrick is one of the biggest sponsors of WNHA activities and events and regularly contributes \$1,000 to Show of Hands. The Orrick project has also been an inspiration, attracting other businesses to Wheeling.

3.4.7 Conclusion

ARCBridge has found WNHA efforts in community development to be very diverse and in keeping with WNHA management goals. WNHA has focused on economic growth and revitalization of the downtown as well as fostering community spirit and expanding the heritage brand into partnerships with local businesses. In visiting several sites and conducting in depth interviews ARCBridge gets the sense that WNHA has become an invaluable partner that is linking larger businesses like Orrick to smaller grassroots community events like Show of Hands.

3.5 Preservation and Education

The cornerstone of Wheeling National Heritage Area's mission has been to preserve the unique history of Wheeling and share it with the world. To this effect, WNHA has partnered with various historic and preservation organizations in Wheeling, has funded exhibits at the West Virginia Independence Hall, has created signage across the city, and has assisted in the restoration of several important statues.

Preservation grants have also made up nearly half of WNHA's grant program with 136 of 278 grants, or 49% being awarded in this category. Nearly two thirds of the total funding allotted to grants, \$373,167 of \$567,380.28, have been spent on preservation and education grants around Wheeling.

With so many grants given in this category ARCBridge has seen a trend of funding preservation organizations for a variety of programs versus continued support for a single event or program, allowing a larger amount of historical projects to gain funding. Some of the longstanding grant recipients include:

National Road Alliance of West Virginia

Grant Number: 7 grants from 2000-2008 ranging as little as \$400 to print brochures about the National Road to \$15,000 to create informational kiosks for a walking tour of the section of the National Road that passes through Wheeling.

Sustainability: A walking tour is now complete as well as a documentary and other videos preserving Wheeling's affiliation with the National Road.

Ohio Valley Public Library

Grant Number: 6 grants from 2009-2016 all under \$1,000. These grants supported historical events at the library ranging from historical film events, an expo, and a Civil War fashion show.

Victorian Wheeling Landmarks Association

Grant Number: 7 grants from 2002-2010 ranging from \$1,000 to conduct a house tour of historic homes in North Wheeling to \$10,000 to actually restore a period kitchen in one of the homes.

Sustainability: These tours are still offered to visitors and locals.

Friends of Wheeling

Grant Number: 14 grants between 2003-2017 Seven of these grants (\$1,000 each) were awarded to help support biennial tours with costumed portrayals at the Greenwood Cemetery.

Sustainability: The tours have attracted more than 400 attendees

3.5.1 West Virginia Independence Hall

One of WNHA's biggest ongoing preservation projects has been supporting exhibits at West Virginia Independence Hall, located in downtown Wheeling. Since 2004, WNHA has given seven grants totaling \$51,010. Projects have included funding films and celebration days. One \$15,000 grant funded a civil war battle flag exhibit, which is now on permanent display at the museum. Another \$8,500 was spent on the acquisition of a historic canon, which is now on display on the Hall grounds.

Independence Hall – Major Milestones

2000 – Wheeling Heritage provides \$8,500 grant for the purchase of a permanently installed canon at Independence Hall

2004 – Wheeling Heritage provides \$15,000 grant to install the Civil War Battle Flag exhibit

2010 – Wheeling Heritage provide nearly \$2,500 for the historic courtroom's sound system upgrades

2011 – Wheeling Heritage provides a partnerships grant for the West Virginia Day celebration

2012 – Wheeling Heritage provides a partnership grant for the Civil War Flag film

2013 – Wheeling Heritage partners with Independence Hall to host multiple events for the West Virginia Sesquicentennial

2014 – Wheeling Heritage provides a partnership grant for the duplication of the Civil War film for schools

2015 – Wheeling Heritage partners with Independence Hall to install a statue of Francis H. Pierpont, the father of West Virginia, outside the historic site

2016 – Wheeling Heritage provides a partnership grant for Ed Bears speaking event

2016-2018 – Wheeling Heritage partners with Independence Hall to relocate the Soldiers & Sailors statue

ARCBridge visited West Virginia Independence Hall both during the meet and greet and the longer site visit to tour the hall, speak to visitors, and interview the Site Manager, Debbie Jones.

“Wheeling is only city to be the capitol of two states in the whole USA. When I started, I had no idea what to do. I got here and this town has a lot of historians here and WNHA connected me to them. Our goal here is to get more local people here because its all free.

The 1st floor exhibits were funded by NPS. I continue to get support from WNHA and count them amongst our top partners.”

- Debbie Jones, Director of Independence Hall

3.5.2 Monuments:

Wheeling Heritage has led or partnered to create, restore, and strategically relocate statuary art throughout the city for the public. Those statues include:

1. Walter Reuther – A labor leader born in Wheeling. He eventually led the UAW-CIO and became president of the union.
2. Madonna of the Trail – One in a series of 12 monuments dedicated to the spirit of pioneer women in the United States. These monuments are along National Road. Wheeling Heritage worked with the Daughters of the American Revolution to restore the monument in Wheeling on National Road.

3. Francis Pierpont - Known as the Father of West Virginia, Pierpont led the secession of West Virginia from Virginia. Wheeling Heritage worked with West Virginia Independence Hall to install a monument to Pierpont outside the building in which West Virginia was created

4. Augustus Pollack – Augustus Pollack was the owner of a cigar factory in Wheeling. Known as a strong labor advocate, the labor unions built a statue in his honor after his death. The monument is the only stature to be built by union laborers in memorial of management. The statue was tucked away in a location isolated by the construction of a highway. Wheeling Heritage moved the monument to a prominent location on the Heritage Port.

5. Soldiers and Sailors – The largest Civil War statue in West Virginia dedicated to the Union, the Wheeling Soldiers and Sailors statue was in need of restoration and to be located in a place where it is visible. Wheeling Heritage is, again, working with WV Independence Hall to move the statue to the Independence Hall site and to restore the statue. **(Wheeling Heritage did not demolish the site. The building that was demolished was adjacent to where the statue is being set. The building did not need to be removed for placement, but rather it was practical that the building be removed. It was not done so the statue could be placed.)**

WNHA has also been involved in a number of long-term restoration projects including:

Mt. Wood Restoration

The restoration of Mt. Wood Cemetery, one of Wheeling’s oldest extant cemeteries, has been a recognizable activity of Wheeling Heritage over the last several years.

Blue Church

This 1837 Greek Revival Church is an icon of the Monroe Street East Historic District. Wheeling Heritage is working to rehab and program this site.

Interpretive Signs throughout the community:

Wheeling Heritage has produced and installed nearly two dozen interpretive signs throughout the city of Wheeling. One series of signs was installed along the trails to provide users of the trail educational opportunities along the way. Another series of signs was installed in communities to demonstrate the historical significance of Wheeling’s neighborhoods.

ARCBridge met with longtime Wheeling Historian Margaret Brennan to hear more about the impact WNHA has had on local preservation efforts.

“I can trace my family back to 1882 in Wheeling. We have a lot of families that go back to the early days 1769, when Wheeling was founded, and their descendants still live here. It’s a very historic city. The people at WNHA do the job of two people each and they are remarkable.

The big project we are working on is the Soldiers and Sailors Monument - we are taking it back to the city. WNHA are providing the national funding, \$130,000. We could not have done it without their coordination – besides funding, that core team of four staff are leaders, facilitators. When they are not around, they are missed. What needs to be worked on, they must toot their own horn more. The stakeholders know, but the community doesn’t. The value is to let the community know what a vital organization WNHA is.”

-Margaret Brennan, Wheeling Historian

3.5.3 Wheeling Young Preservationists

WNHA has also made strides to connect the past and future of Wheeling by supporting the Wheeling Young Preservationists (WYP) group, a 50 member education organization geared towards exciting young residents to get involved in preservation efforts like “lovescaping,” which places hearts on vacant vandalized buildings.

ARCBridge met with members of WYP to learn more about the effects of WNHA efforts on younger citizens in Wheeling.

“I’m an 8th generation Wheeling resident – my family has been here since the founding. It’s actually a very common story here among my generation that you move out of Wheeling and return in your 20’s and 30’s. I didn’t like it when I came back, I felt disconnected until I joined WYP. My wife and I found other young people we can connect with and we started to notice a very positive growth and optimism. Honestly I’ve stayed in Wheeling because of this community and I find so many young people are getting excited about preservation because of organizations like WNHA.”

- Bennett McKinley, WYP President

A \$1,000 grant funded in 2016 by WNHA helped to create numerous programming events like monthly happy hours that feature “how to” workshops for preservation projects for homeowners, attracting more than 1,200 attendees.

“Our generation was instilled with the idea that Wheeling wasn’t cool. My parents moved to Wheeling in 1987. I got a local internship where I could live with them and save up. I still wanted to leave Wheeling but not anymore. Our cost of living is low, our suburbs are nice, we have Oglebay, small amenities. Now thanks to WYP, my life is amazingly busy. I found a building that needed to be gutted and learned so much about how to be a landlord and preserve these old houses thanks to WYP and WNHA. We want young people invested in this city. A lot of things need to change. We just spent a lot of money on the minor league hockey arena ...\$7 million! I would like to see more investment in our streetscape. WNHA’s handle on social media and reaching out to young people is fantastic. We go to the Show of Hands events and they make us feel part of this community here.”

- WYP member Will Wallace

3.5.4 Conclusion

ARCBridge has found WNHA to be very well known amongst the preservation societies of Wheeling. WNHA has found a unique way to preserve the past while enlivening Wheeling’s future by supporting older historical groups like Friends of Wheeling as well as newer organizations like Wheeling Young Preservationists. In doing so, WNHA is serving as the link and ARCBridge has noticed other organizations looking to WNHA for leadership to organize new projects.

3.6 Marketing & Tourism Activities

Key goals highlighted in the 2004 WNHA Management Plan included increasing tourism benefits and extending the WNHA heritage brand. Marketing efforts have focused on public relations, social media, and the dissemination of historic brochures and public presentations. Several articles have also been published highlighting WNHA programs in local, regional, and national media publications. Marketing components include:

3.6.1 Social Media

- Posting multiple times per week on Facebook and Twitter year-round promoting WNHA programs/events and engaging the community
- Using Facebook Ads year-round to highlight key content and promote events such as Giving Tuesday, engage new audiences, and encourage donations (see Table 3-3 below)

Date	Likes	% Change from Previous Year
16-Apr	991	
17-Apr	1,210	122%
18-Apr	2,002	165%

Table 3.3: Facebook Activity

Facebook reach (see Table 3-4 below):

- March 2016 – March 2017 average organic reach per post: 105
- March 2017 – March 2018 average organic reach per post: 771

Dates	Reach	% Change from Previous Year
3/1/2016 - 3/1/2017	105	
3/1/2017- 3/1/2018	771	734%

Table 3.4: Facebook Reach

3.6.2 Website/Email Marketing

- Post on the website up to twice a month – promote Wheeling Heritage’s position on various issues, highlight Wheeling Heritage projects, and share news and events
- Email marketing – monthly newsletters, target promotions, distribute news, inform stakeholders, encourage participation for events like Amazing Raise and Giving Tuesday, and encourage donations

Promotional Materials

- Wheeling Heritage impact brochure – Increase awareness of Wheeling Heritage and its importance
- Historical brochures – as needed – highlight historical significance of various neighborhoods, places in Wheeling
- Upper Ohio Valley Historical Review – bi-annual publication – engage community and share historical information about Wheeling

Public Relations

- Presentations to Community Organizations – at least 8 per year – increase awareness of Wheeling Heritage and its programs
- Press releases – As needed, multiple times per month – Distribute news, promote

3.6.3 Media Coverage

WNHA programs have been featured in over two dozen articles in The New York Times, Associated Press, Pittsburgh Post-Gazette, Wheeling Intelligencer, and many more local publications. In addition, WNHA Executive Director Jake Dougherty was recently included in the National Trust for Historic Preservation’s 40 Under 40 annual list, which highlighted WNHA’s ability to leverage technology, law, and finance to spur community investment in preservation-based projects.

3.6.4 Community Intercept Surveys

The ARCBridge team undertook a series of community intercept interviews over the course of the WNHA evaluation. Some of these interviews took place with community members during our visit to the Capitol Theatre. Other interviews took place at various locations around town including Centre Market, The Oglebay Resort, and Independence Hall. In conjunction with the interviews, ARCBridge attempted to determine:

- What did consumers know about WNHA
- How they learned about the specific site that they visited
- Would they recommend visiting the Heritage Area and/or the specific sites to their friends and acquaintances

The results of the interviews indicated that visitors were enthusiastic about the sites they were visiting, but were mostly unaware of the role of the Wheeling National Heritage Area and its activities in supporting these exhibits, facilities, and venues.

Most people that were surveyed are older Wheeling citizens who have lived in the city all their life. They generally were made aware of WNHA related events through advertisements on local TV news. Younger Wheeling residents were more aware of the Heritage Area and were attending a WNHA program because of a Facebook invitation, post, or personal friend.

Some residents actually expressed confusion as to the difference between WNHA and other preservation groups in town. Citizens wanted to learn more about WNHA efforts and were surprised to hear how many projects WNHA was involved with around town. ARCBridge believes there is ample opportunity to expand WNHA's marketing outreach and has learned from discussions with WNHA leadership that this is a top goal in the coming years (a communications officer was hired in 2017 to increase brand visibility locally and regionally).

Activities	Visitors
Downtown Events and Activities	475,000
Capitol Theatre	57,000
Wheeling Island	900,000
Oglebay Resort	825,000
Independence Hall	5,500
Oglebay Mansion	33,000
TOTAL	2,295,500

Table 3.5: Wheeling Visitors for FY2017

Fiscal Year	Workshop/Training	Attendance
2013	Cemetery Conservation workshop with Jon Appell	33
2014	Camp Architecture	11 students
2015	PAWV Window Restoration Workshop	12
2016	WVAM: Quilts and Coverlets Workshop	21
2017	WNAM: Identifying Wheeling Objects in your	22
	Collection Management Workshops	

Table 3.6: Examples of Workshops and Trainings Provided by WNHA

Workshops at Mt. Wood:

- June 2014: 15 people
- July 2014: 16 people
- August 2014: 14 people
- September 2014: 17 people
- Oct 2014: 4 people

- May 2015: 12 people
- June 2015: 14 people
- July 2015: 19 people
- August 2015: 23 people
- September 2015: 17 people
- October 2015: 6 people

- May 2016: 11 people
- June 2016: 9 people
- July 2016: 15 people
- August 2016: 6 people
- Sept 2016: 7 people
- October 2016: 6 people

- April 2017: 10 people
- May 2017: 6 people
- June 2017: 7 people
- August 2017: 26 people
- Sept 2017: 5 people

3.7 WNHA Partners

The second major goal in the authorizing legislation was to provide framework to enhance, preserve, and interpret resources, while the 2004 Management Plan goals sought economic development, increased tourism, extending the heritage brand through partnership, and sustainability in expanding local community support and partners.

ARCBridge has found strong partnerships to be the cornerstone of WNHA operations. Wheeling Heritage has solidified tremendous alliances with every major organization in Wheeling, from the City of Wheeling to the Wheeling Convention and Visitors Bureau, to several historical societies and building development groups and institutions.

WNHA has a large board and the leadership of many of these partner organizations also serve as WNHA board members, allowing WNHA interests to have a prominent place in Wheeling city initiatives at large. ARCBridge believes these partnerships to be invaluable in fulfilling the authorizing legislation goal of providing framework to resources as well as extending the heritage brand and economic development and sustainability.

3.7.1 Mayor of Wheeling

In particular WNHA has forged an invaluable relationship with the current Mayor of Wheeling, the City Council, and City administration, which will allow WNHA interests to be heard and promoted at the highest levels of regional government. Through an extensive in depth interview, ARCBridge has learnt WNHA played an integral part in the Mayor of Wheeling's decision to buy a historical building downtown, which in turn, allowed him to connect with fellow citizens and be inspired to run for office in the first place.

"At the end of 2008, I was a corporate DC lawyer and my life didn't have purpose. So I returned to Wheeling to figure things out. Our family had been here 6-7 generations but I had never had a real connection. Six months in, I realized all the reasons I left Wheeling were exactly why I wanted to come back now -in DC I didn't know my neighbors. Here I got involved in civic society - I joined the Wheeling Young Preservationists in 2013. I was assigned for lovescaping on Main Streer and a group was doing this building.

I remember seeing the building and saying wow! I didn't know this building was for sale. My DC brain thought it was cheap. I contacted the owner, spent the summer researching, and was put in touch with WNHA who had done a feasibility study. I wasn't a building guy. I bought it for \$70,000 but the overall price was \$1.2 million to get it all done structurally. Almost everyone - family, peers said do not invest, its a money pit. It's not worth it."

"It wasn't a smart thing, it was a passionate thing. The local newspaper did a story on me that got me some attention and people asked me to join their boards. Demolition was the name of game in Wheeling and no one was buying buildings at the time. The mayor gave me an award, gave me a platform. I have no doubt I wouldn't have been elected if I didn't show I bought into the city and put my money where my mouth is.

I stumbled into things and without WNHA - had they not paid and commissioned this study, I wouldn't have known enough and I wouldn't have spent the five thousand dollars myself. WNHA was a catalyst – and now this building has given me a project and a purpose for the rest of my life. I made more money in DC, but now I have more meaning. I used to have nothing I would want to put on my epitaph and now I have something I am eternally proud of. I feel a connection with this building from 1891 and feel responsible to keep it going. It's on me to keep it here for another 100 years."

- Wheeling Mayor Glenn Elliott

3.7.2 Top Wheeling Partners According to Wheeling Staff

1. City of Wheeling

Wheeling Heritage continues to work very closely to develop programs and projects that benefit the city and its residents. Wheeling Heritage is provided the Artisan Center for operations (an in-kind donation from the city). The partnership with the city goes back to its founding and is still very strong today.

2. Regional Economic Development Partnership (RED)

Wheeling Heritage also works closely with RED on building development efforts and business development efforts. A profit-sharing agreement with RED regarding the Wheeling Stamp- ing Building (Orrick) provides Wheeling Heritage

with nearly \$150,000 of annual sustainable cash flow. This is a significant partnership that is helping Wheeling Heritage become more financially sustainable.

3. Wheeling Conventions & Visitors Bureau

Wheeling Heritage works closely with the Wheeling CVB on tourism initiatives, and Wheeling Heritage was, and continues to be, a key partner in the rehabilitation of the historic Capitol Theatre. Wheeling Heritage helped secure funds and manage the construction projects on the Capitol Theatre.

4. West Virginia Independence Hall (West Virginia Division of Culture & History)

Wheeling Heritage works closely with West Virginia Independence Hall and the West Virginia Division of Culture and History to build upon the theme of West Virginia Statehood and the Civil War. We have provided grant funding for many interpretive exhibits in the Hall and have recently worked add statuary art to the site.

5. Friends of Wheeling

Friends of Wheeling is the longest running historic preservation organization in the state of West Virginia. As a community-driven, volunteer-only organization, Friends of Wheeling has partnered with Wheeling Heritage on several projects over the years. From cemetery tours to annual dinners, the two organizations have worked together to ensure that Wheeling preserves its strong historic heritage.

Section 4

Impact of Public/Private Investments on Wheeling National Heritage Area

The Wheeling National Heritage Area (WNHA) was designated as a National Heritage Area in October 11, 2000 through Public Law 106-291, Section 157, Stat. 964. As per the law, the Wheeling National Heritage Act of 2000 provides appropriations to WNHA under the following conditions:

(1) IN GENERAL.—There is authorization for appropriation of \$10,000,000, except that not more than \$1,000,000 may be appropriated out of this section in any fiscal year.

(2) MATCHING FUNDS.—Federal funding provided under this section shall be matched at least 25 percent by other funds or in-kind services.

(3) SUNSET.—The Secretary may not make any grant or provide any assistance under this section after September 30, 2015. This original sunset period was extended (in FY2015) on December 9, 2014 by the National Defense Authorization Act (PL 113-235) until September 30, 2021.

Wheeling National Heritage Area Corporation (Wheeling Heritage) is the management entity or coordinating entity that is designated by Congress to manage the Wheeling National Heritage Area using funds provided by NPS.

4.1 Investments in WNHA Development

Table 4.1 provides a picture of early, direct investment of National Park Service (NPS) funds in Wheeling National Heritage Area between FY1995 and FY2000. It is important to note that a good bit of funding from the National Park Service and from the U.S. Department of Transportation was provided to what is now the Wheeling National Heritage Area prior to its official designation as a National Heritage Area by Congress.

Funding from the National Park Service during this period was obtained through an earmarking process initiated by Senator Robert Byrd (D-WV) who was, at the time, the Chairman of the Senate Appropriations Committee. This funding from the National Park Service was labeled as “construction funds” and was authorized beginning in FY1995, amounting to just over \$12.4M.

Table 4.1: Wheeling Heritage Pre-Designation NPS Construction Funding

Fiscal Year	NPS Construction Funding
1995	\$2,439,341.00
1996	3,441,199.76
1997	1,948,154.00
1998	796,854.00
1999	2,608,584.00
2000	1,190,824.00
TOTAL	\$12,424,956.76

As will be described below, additional NPS construction funds were provided to Wheeling Heritage after congressional designation of the National Heritage Area in October, 2000.

Table 4-2 below provides a picture of direct investment of funds for the Wheeling National Heritage Area since NHA designation through FY2016.

Over the post-designation period, Wheeling Heritage garnered investments encompassing over \$25.4M, including federal funding and non-federal matching funds. Note that information regarding NPS funding levels were provided from NPS records. Information on other sources of funds were provided from records maintained by Wheeling Heritage. These latter data were independently audited and accepted by the National Park Service.

FY	NPS Funding Level*	NPS HPP Funds Accrued	NPS Construction Funds	NPS Save Americas Treasures Grants	Other Federal Grants (Non-NPS)	Total Non-Federal Match	Total Investment in National Heritage Area	Total Expenditures
2001	593,000	1,029,000	2,200,000			504,783	3,733,783	3,979,714
2002	1,000,000	652,632	2,845,338		468,717	121,791	4,088,478	3,870,190
2003	576,000	456,085				375,838	831,923	1,050,973
2004	988,000	766,558				331,303	1,097,861	1,181,272
2005	888,000	846,404				363,157	1,209,561	1,283,138
2006	788,000	682,026	1,481,635		425,178	334,943	2,923,782	2,942,098
2007	631,433	852,562				354,900	1,207,462	1,059,884
2008	637,000	610,475				401,045	1,011,520	1,097,646
2009	637,000	789,500				386,662	1,176,162	1,052,358
2010	637,000	821,628				368,129	1,189,757	1,222,221
2011	613,000	521,302				365,061	886,363	891,367
2012	596,000	580,103				408,725	988,828	866,498
2013	528,000	688,950				543,853	1,232,803	978,114
2014	596,000	558,171		173,290		798,446	1,529,907	1,490,811
2015	596,000	757,754		25,497		621,308	1,404,559	1,217,506
2016	596,000	672,808				639,097	1,311,905	1,277,911
Total	10,900,433	11,285,958	6,526,973	198,787	893,895	6,919,041	25,824,654	25,461,701

Table 4.2: Investments in Wheeling National Heritage Area (2001-2016)

As Table 4.2 indicates, over the period since NHA designation, Wheeling Heritage received three different sets of funds from the National Park Service (NPS). First, as per the enabling legislation, Wheeling National Heritage Area received funds from the NPS Heritage Partnership Program which totaled over \$10.9M. These funds were focused on Heritage Area programming and required a 25% non-federal match. The second set of funds from NPS were part of the earmarked funds from Senator Byrd for construction efforts in downtown Wheeling. This funding began in FY1995 and ran through FY2000, during which time, Wheeling Heritage was provided with \$12.42M. This funding continued through FY2002 and was also provided in FY2006. Thus, since the designation of the Heritage Area, WNHA received just over \$6.5M in additional National Park Service construction monies. These construction funds do not have a match requirement.

4.1.1 Non-Federal Matching Funds

The third and final set of NPS funds were from NPS's Save America's Treasures grants and amounted to just under \$199,000 for grants in FY2015 and FY2016. These funds have a 50% match requirement.

Wheeling Heritage also obtained additional federal grant monies totaling nearly \$900,000. Funds from other federal agencies came from the U.S. Department of Transportation (Division of Highways) and the U.S. Department of Housing and Urban Development via the City of Wheeling (from the Community Development Block Grants program).

Non-Federal Matching funds (*see Table 4.3 below*) amounted just over \$6.9M for the period and will be described in more detail below.

FY	Net Retail Sales	Rental Receipts	Property Income from Orrick	Special Events	Other Grants	Miscellaneous Revenue	In-Kind Contributions	Total Non-federal Match
2001	30,969	57,816	-	4,201	405,650	6,147	-	504,783
2002	32,941	67,215	-	18,293	-	3,342	-	121,791
2003	33,383	66,669	-	10,904	4,184	46,263	214,435	375,838
2004	32,506	69,860	-	10,115	2,000	2,387	214,435	331,303
2005	25,691	73,815	-	13,057	35,976	183	214,435	363,157
2006	25,923	73,287	-	10,062	9,435	1,801	214,435	334,943
2007	28,977	81,380	-	10,840	24,503	649	208,551	354,900
2008	25,206	83,923	-	9,744	75,335	1,027	205,810	401,045
2009	22,810	127,319	-	13,258	17,143	322	205,810	386,662
2010	18,297	129,133	-	14,637	-	252	205,810	368,129
2011	15,482	126,216	-	14,395	3,047	111	205,810	365,061
2012	23,301	125,832	31,899	14,125	2,968	4,790	205,810	408,725
2013	23,494	127,144	127,596	17,763	26,663	15,383	205,810	543,853
2014	17,667	131,567	127,596	16,579	206,290	92,937	205,810	798,446
2015	8,638	127,998	133,596	17,080	101,783	26,403	205,810	621,308
2016	12,878	129,323	145,596	16,698	95,703	33,089	205,810	639,097
	378,163	1,598,497	566,283	211,751	1,010,680	235,086	2,918,581	6,919,041

Table 4.3: Non-Federal Matching Funds

Table 4-3 provides a year-by-year description of the sources of non-federal matching funds generated by Wheeling Heritage since NHA designation.

As Table 4-3 reveals, Wheeling Heritage accumulated more than \$6.9M in non-Federal matching funds over the period between FY2001 and FY 2016. These funds included retail sales from the retail outlet in the Artisan Center in downtown Wheeling (\$378,163) and rental receipts obtained from properties in the Artisan Center (nearly \$1.6M). Additional property income came from the Wheeling Stamping Building (i.e. Orrick, Harrington & Sutcliffe) which amounted to nearly \$600,000.

Matching funds were also generated from in-kind contributions (more than \$2.9M) and special events held at Heritage Port (which produced \$211,751). In addition, over \$1M was obtained from other sources of grant funds. The other grants included in this category include monies from the Benedum Foundation, the Hess Family Foundation, and the City of Wheeling General Funds Allocation.

To put this level of matching non-Federal funds in context, the required level of matching is examined in *Table 4-4 below*. The table reveals that the level of non-federal matching funds required by the National Park Service was just over \$2.82M for the period.

NPS Match Required:	25%	50%			
Fiscal Year	NPS Reported HPP Funds	Save America's Treasures	NPS Required Match	Non-Federal Matching Funds	Excess Match
2001	593,000		148,250	504,783	356,533
2002	1,000,000		250,000	121,791	(128,209)
2003	576,000		144,000	375,838	231,838
2004	988,000		247,000	331,303	84,303
2005	888,000		222,000	363,157	141,157
2006	788,000		197,000	334,943	137,943
2007	631,433		157,858	354,900	197,042
2008	637,000		159,250	401,045	241,795
2009	637,000		159,250	386,662	227,412
2010	637,000		159,250	368,129	208,879
2011	613,000		153,250	365,061	211,811
2012	596,000		149,000	408,725	259,725
2013	528,000		132,000	543,853	411,853
2014	596,000	173,290	235,645	798,446	562,801
2015	596,000	25,497	161,749	621,308	459,560
2016	596,000		149,000	639,097	490,097
Total	10,900,433	198,787	2,824,502	6,919,041	4,094,539

Table 4.4: Required and Reported Non-Federal Matching Funds

The reported match was just under \$6.92M which means that Wheeling Heritage over-performed on its match requirements by nearly \$4.1 M. In 2002, the non-Federal matching funds was less than the required amount for that year. That is, the required match was \$250,000 while only \$121,791 in non-Federal match was achieved in that year. However, the overall match level across the period was well above the required match level.

4.1.2 Leveraged Funds

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

These funds include monies provided by other federal agencies and any relevant matched funds associated with federal programs. Leveraged funds for Wheeling Heritage are shown in *Table 4-5 below*.

The table reveals that the National Park Service provided HPP funds in the amount of \$10.9M, while Wheeling Heritage generated a total of \$25.46M. The leverage is more than \$14.5M. This generates overall leverage ratio of 1.33.

Thus, for every HPP dollar invested, Wheeling Heritage generated more than 1.3 times the number of HPP dollars.

Fiscal Year	NPS Reported Funding Level	NPS Construction Funds	NPS Save Americas Treasures Grants	Other Federal Grants (Non-NPS)	Total Non-Federal Match	Total Investment in National Heritage Area	Leverage
2001	593,000	2,200,000			504,783	3,297,783	2,704,783
2002	1,000,000	2,845,338		468,717	121,791	4,435,846	3,435,846
2003	576,000				375,838	951,838	375,838
2004	988,000				331,303	1,319,303	331,303
2005	888,000				363,157	1,251,157	363,157
2006	788,000	1,481,635		425,178	334,943	3,029,756	2,241,756
2007	631,433				354,900	986,333	354,900
2008	637,000				401,045	1,038,045	401,045
2009	637,000				386,662	1,023,662	386,662
2010	637,000				368,129	1,005,129	368,129
2011	613,000				365,061	978,061	365,061
2012	596,000				408,725	1,004,725	408,725
2013	528,000				543,853	1,071,853	543,853
2014	596,000		173,290		798,446	1,567,736	971,736
2015	596,000		25,497		621,308	1,242,805	646,805
2016	596,000				639,097	1,235,097	639,097
Total	10,900,433	6,526,973	198,787	893,895	6,919,041	25,439,129	14,538,696

Table 4.5: Leveraged Funds for Wheeling Heritage

Table 4-5 also shows that largest contribution to leveraged funds were additional earmarked construction funds provided by NPS. These amounted to more than \$6.5 M as a result of grants in FY2001, FY2002 and FY2006. Additional large elements of leveraged funds included in-kind contributions (over \$2.9 M), rental receipts from the Artisan Center (\$1.6 M), other non-federal grants (just over \$1 M) and \$900,000 in non-NPS federal grants.

4.2 Use of Financial Resources

Wheeling Heritage receives funding from the National Park Service, other federal agencies, local

institutions and grants from foundations and income from the use of renovated properties, retail sales, and local community events.

Table 4-6 below shows a breakdown of program and management/operating expenses by fiscal year. The table also breaks out the expenses by programmatic area. In the case of Wheeling, these areas are divided along the lines of three different areas:

1. Site & Building Development and Restoration
2. Arts
3. Education & Interpretive

Fiscal Year	Site & Building Development & Restoration	Arts	Education & Interpretive	Total Programming Expenses	Management/Operational Expenses	Total Expenses	% of Management/Operation Expense to Total Expense
2001	3,581,139	105,643	8,225	3,695,007	284,707	3,979,714	7%
2002	3,463,726	118,518	19,335	3,601,579	268,611	3,870,190	7%
2003	510,410	117,947	227,006	855,363	195,610	1,050,973	19%
2004	608,759	110,690	212,750	932,199	249,073	1,181,272	21%
2005	688,953	110,728	206,135	1,005,816	277,322	1,283,138	22%
2006	2,300,561	85,653	246,419	2,632,633	309,465	2,942,098	11%
2007	588,815	85,989	109,661	784,465	275,419	1,059,884	26%
2008	625,767	85,928	111,567	823,262	274,384	1,097,646	25%
2009	580,567	89,993	105,948	776,508	275,850	1,052,358	26%
2010	723,339	81,283	117,630	922,252	299,969	1,222,221	25%
2011	518,350	60,888	24,998	604,236	287,131	891,367	32%
2012	511,185	57,971	37,130	606,286	260,212	866,498	30%
2013	535,563	57,524	107,572	700,659	277,455	978,114	28%
2014	900,332	57,211	221,655	1,179,198	311,613	1,490,811	21%
2015	693,197	67,053	148,357	908,607	308,899	1,217,506	25%
2016	759,704	69,428	98,877	928,009	349,902	1,277,911	27%
	17,590,367	1,362,447	2,003,265	20,956,079	4,505,622	25,461,701	18%

Table 4.6: Expenditures by Year Broken Out by Program Area and Programmatic and Management/Operating Expenses

The largest category of expenditure was for Site & Building Development and Restoration, which amounted to nearly \$17.6M between FY 2001 and FY2016. It should be noted that the largest expenditures in that category correspond with the continuation of NPS Construction funding to Wheeling Heritage in FY2001, FY2002 and FY2006.

A breakout of programming expenses versus management/operational expenses shows that programming accounted for nearly \$21M and management/operational expenses were approximately \$4.5M. Thus, management/operating expenses consumed 17.7% of total expenditures, while programmatic expenditures consumed 82.3%.

The ratio of annual management/operational expense to total expense has varied substantially over the period since NHA designation and has ranged from a low of about 7% to a high of 32% in a single year.

Graph 4-1 below shows the percentage of programmatic expenditures by specific programmatic area. The graph reveals that Site & Building Development has accounted for 84% of programmatic funds, while education and interpretive programs accounted for 10% of programmatic expense, and the arts consumed about 6% of programmatic funds.

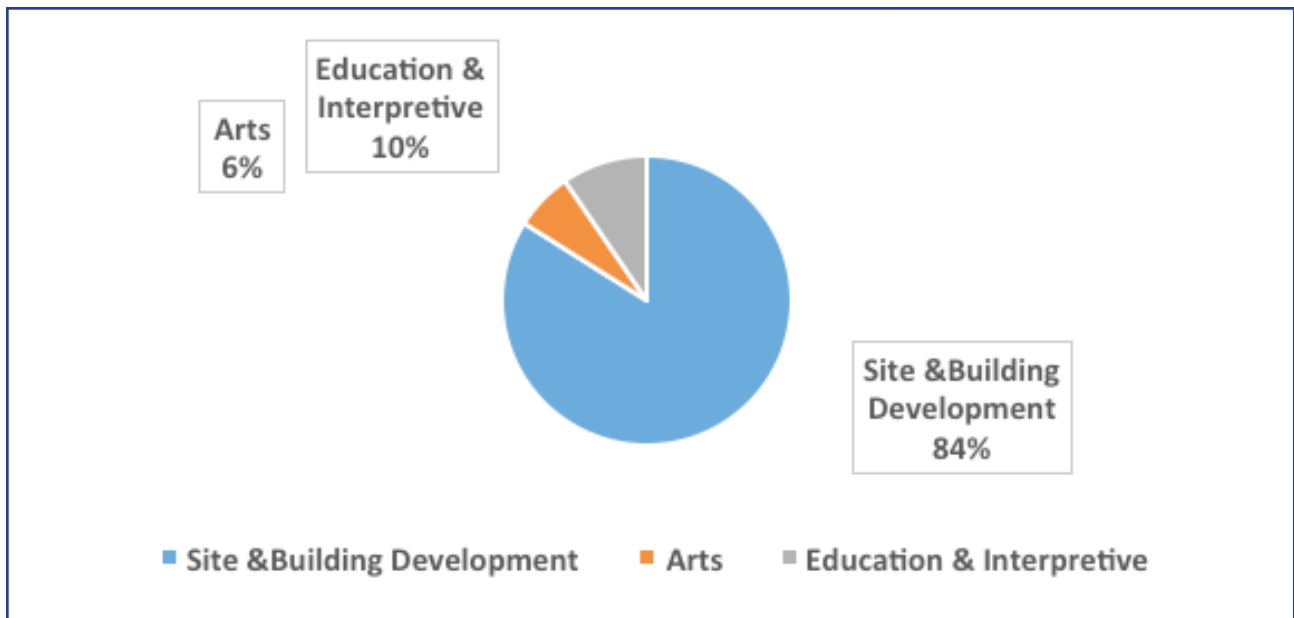


Fig. 4.1: % of Program Expenditure by Area

4.3 Other Measures of NHA Impact

In additional to examining financial impacts of Wheeling Heritage, ARCBridge notes that the major focus of the program has been on revitalization of the city with an emphasis on the city's heritage. Given this focus, ARCBridge attempted to assess the impact of the program on the number of registered national historic properties in the area. These contributing resources include buildings, structures, objects and/or sites that are in the National Register of Historic Places.

As of 2017, the State of West Virginia has 23,684 contributing resources listed in the National Register of Historic Places. The City of Wheeling had 3,170 contributing resources or 13.4% of contributing resources in the state. It should be recognized that the population of Wheeling represents only 1.5% of the state population (Source: US Census Bureau, July 2016 estimate).

In addition, data from the 2010 U.S. Census indicates that Wheeling accounts for only 1.7% of all of the housing units in the state. Thus, the historic resources that are registered in Wheeling represent a disproportionate contribution to the National Register in the state as a whole given the city's small portion of the state population and of housing units.

In addition, it was determined that there were 67 Federal historic tax credits (for historic building restoration) fully approved in West Virginia between 2006 and 2018. Of these, 10 or 15% of these credits were granted in the Wheeling area. Again, Wheeling is reflecting a disproportionate contribution to the development and restoration of historic sites in the state.

These developments reflect clear recognition of the contribution made by Wheeling Heritage's staff with professional backgrounds in history and in historic restoration programs.

4.4 WNHA Retained Earnings

Retained earnings in non-profit organizations are indicative of organizational sustainability since they reflect the ability of an organization to save funds after fulfilling its operational and programmatic responsibilities.

ARCBridge has found that Wheeling Heritage has maintained a strong financial footing for many years. They have developed methods of financial sustainability that have allowed them to accumulate unrestricted funds over an extended period of time and have maintained a tight operating expense budget. This is evidenced by the accumulation of approximately \$250,000 of unrestricted cash reserves each year.

The organization now maintains cash reserves that total in excess of \$1,300,000 as of the end of the last fiscal year, dated September 30, 2017. The organization has no debt on their books as of September 30, 2017 and has Net Assets, as of this date, of \$5,320,967.

It should be noted that the retained earnings described above are entirely a function of non-Federal funds. The accumulation of retained earnings has developed over a period of time and is a function of retail sales from the Artisan Center, profit-sharing from the Wheeling Stamping building, donations from the public, and other non-Federal sources.

Section 5

WNHA Sustainability

5.1 Defining Sustainability

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

“...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 ongoing capacity building; communication; and collaboration among local entities;
- Program and project stewardship where the combined investment results in the improved economic value and ultimately long-term quality of life of that region; and

- Outreach and marketing to engage a full and diverse range of audiences.

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

5.2 Honoring WNHA’s Legislative Mandate

Wheeling National Heritage Area was designated as a National Heritage Area in October, 2000, through Public Law 106-291, Section 157, the Wheeling National Heritage Act of 2000. As outlined in the Wheeling National Heritage Area Act of 2000, legislation recognizes that “the area in and around Wheeling, West Virginia represents major heritage themes of transportation, commerce and industry and Victorian culture in the United States.” “

The city of Wheeling has played an important part in the settlement of this country by serving as:

- a) the western terminus of the National Road of the early 1800’s
- b) the ‘Crossroads of America’ throughout the nineteenth century
- c) on the few major inland ports in the nineteenth century
- d) the site for the establishment of the Restored State of Virginia and later the State of West Virginia during the Civil War.” (Congressional Record-Senate, S7798, July 27, 2000).

There are numerous projects that make it evident that Wheeling Heritage has fulfilled the mandate outline in the enabling legislation.

Illustrative projects meeting these requirements are shown in *Table 5-1 on the next page*.

Project	Heritage Theme	Current Function
Heritage Port and Heritage Trail	Transportation	Waterfront Park for festivals, waterfront programs, connects population to the Ohio River
Intermodal Transportation Center	Transportation	Parking for automobiles at the Heritage Port, public transportation center, offices of the Convention and Visitors Bureau
Artisan Center	Industrial Era	Offices of Wheeling Heritage, retail space, art exhibits, annual Celtic celebration
Wheeling Stamping Building	Industrial Era	Global operations center for Orrick, Herrington & Sutcliffe
Mt. Wood Cemetery & Overlook	Victorian Era	Walking tours
Dwelling Survey in North Wheeling	Victorian Era	Walking tours, identify sites for Historic Register
Survey in South Wheeling	Industrial Era	Walking tours, identify industrial sites for Historic Register
Exhibits in West Virginia Independence Hall	Site for the Capitol of West Virginia during the Civil War	Exhibits describing the establishment of the State of West Virginia when the Commonwealth of Virginia seceded from the Union during the Civil War

Table 5.1: Programs Illustrative of Heritage Themes Stressed by WNHA

These illustrative projects demonstrate that Wheeling Heritage has had a continuing focus on the major heritage themes embodied in the enabling legislation. While some of these projects involve relatively small efforts, several of them (e.g. Heritage Port, Heritage Trail, the Intermodal Transportation Center, the Artisan Center and the Wheeling Stamping Building) reflect significant financial investments for site and building restoration involving millions of dollars.

It is clear from ARCBridge’s analysis in Sections 2 and 3 in this document that Wheeling Heritage has developed a strong working relationship with multiple levels of government and private sector organizations in West Virginia including the City of Wheeling, Ohio County, West Virginia and the State of West Virginia, Oglebay Institute, RED Partnership, and the Wheeling Convention and Visitors Bureau.

The City of Wheeling and other governmental organizations have had significant representation on the Wheeling Heritage Board of Directors. These include the Mayor of Wheeling (Glenn Elliott), two City Council members (Wendy Scatterday and Brian Wilson), as well as Allison Skibo who works in the office of the Wheeling City Manager. One of the Ohio County Commissioners (Orphy Klempa) is also on the Board of Directors. Another member of the Board of Directors, Erikka Storch is a Delegate to the West Virginia House of Delegates and President of the Wheeling Chamber of Commerce.

From the private sector (including non-profit organizations), the Board includes representatives from Orrick, Herrington & Sutcliffe (Stephen Johnston), WesBanco (Michael Mistovich), The Health Plan (Wendy Hodorowski), the Wheeling Convention and Visitors Bureau (Frank O’Brien), Friends of Wheeling (Jeanne Finstein), and many more.

Over the history of Wheeling Heritage operations, the City of Wheeling has been actively involved in the funding of the organization's programs and projects. For example, funding for the Intermodal Transportation Center (\$9 M) was provided by a grant from the Federal Transit Administration within the US Department of Transportation through the Wheeling Municipal Parking Authority. These funds were part of the earmarked funding program begun by Senator Byrd. The city has also contributed monies from its general fund to support Heritage Port construction as well as the Reinvent Wheeling program (in 2006 and 2015 respectively), which is now run by Wheeling Heritage.

Wheeling Heritage has also worked closely with a number of private sector entities (including non-profit organizations) to further the National Heritage Area mission in Wheeling. These include such entities as:

- Community Foundation for the Ohio Valley
- Wheeling Convention and Visitors Bureau
- Oglebay Institute
- RED Partnership
- Oglebay Park
- Orrick, Herrington, & Sutcliffe
- Friends of Wheeling
- Wheeling Young Preservationists

As described earlier, Wheeling Heritage has been actively engaged with private institutions, local communities and government agencies to preserve, protect, interpret and develop the cultural, historic and natural assets of the Wheeling/Ohio County area. Section 3 of this report describes in detail the efforts initiated by Wheeling Heritage to accomplish those elements of its mission across the programs that have been launched and maintained throughout the organization's tenure.

5.2.1 Governance and Oversight

The key to assessing Wheeling Heritage management capacity rests on the performance of the

Board of Directors, its Executive Director, and the staff members in the organization.

Board Members

The Wheeling Heritage Board of Directors consists of a diverse group of twenty-two individuals whose backgrounds encompass a wide range of disciplines including:

- Economic and community development
- Business management
- Board governance
- Architecture
- Construction and project management
- Finance and investing
- Federal, state, county, and municipal government
- Legal affairs, public, and government relations
- Marketing and cultural tourism
- Fundraising and nonprofit management
- Higher education and history

Of the 22 members of the Board, 11 have been active members for at least four years. Thus, ARCBridge has found that the Board of Directors has a strong mix of long-term members as well as a group of newer members who bring new and innovative ideas and considerations to the planning and governance process.

Details regarding the length of tenure on the board and members respective skills sets were shown in Section 2 of this report (See Table 2-4).

5.2.2 Staffing and Operations

ARCBridge believes Wheeling Heritage staff is well-suited to the tasks confronting the National Heritage Area. The current Executive Director (Jake Dougherty) came to Wheeling Heritage from his position as the Head of the Reinvent Wheeling organization, which merged with Wheeling Heritage in 2016. Mr. Dougherty was recently named to a national list of honorees by

the National Trust's "40 under 40" group which reflects his nationally recognizable work in economic revitalization in Wheeling. He has also championed a number of state-wide efforts including the West Virginia Abandoned Properties Coalition through which he successfully led advocacy efforts to increase West Virginia's State Historic Tax Credit. As part of his work, he created a financial model, which can be used by other states to evaluate the effectiveness of their state historic tax credits. Mr. Dougherty earned a Bachelor of Arts degree in public communications and political science from American University. He was previously a member of AmeriCorps and was the communications manager of Taste of DC, LLC.

The current Wheeling Heritage staff includes Chris Villamagna who serves as program manager. Chris has a degree in journalism and communications from Point Park University. Chris manages the Artisan Center retail shop and art gallery. In this position she manages the retail operation and recruits artists while curating shows in the gallery.

Rebekah Karelis is a project manager and manages a number of historical, interpretive and restoration projects including Mt. Wood Cemetery restoration while writing grants. She acts as a liaison with the State Historic Preservation Office and is the editor of the Upper Ohio Valley Historical Review and is the president of the West Virginia Association of Museums. Bekah earned a BA in Anthropology and a Master of Arts in Public History from West Virginia University.

Alex Weld is a Project and Outreach Manager on the Wheeling Heritage Staff. Alex has a Masters' Degree in Integrated Marketing Communications from West Virginia University. She has specialized in social media and is a former reporter and TV news producer. She runs downtown Wheeling's Main Street program as well Show of Hands, a successful community-oriented crowd-funding event. She also writes grants and works on various downtown development projects and activities.

Wheeling Heritage also employs a part-time Chief Financial Officer, Pat Felton. Pat is a CPA and has been with the organization for a number of years. Pat provides continuity and professional accounting and auditing skills which are essential in the financial management of the organization. This is particularly important since a good portion of the Wheeling Heritage program was focused on site and building restoration involving the investment of multi-millions of dollars for construction and renovation.

5.2.3 Strategic Planning and Adaptive Management

In specific terms, the Wheeling Heritage Board has a long history of active involvement in planning as well as the testing (and courageous rejection where appropriate) of new and unique concepts in its programming:

- 2001 – the Wheeling Heritage Board, with Executive Director Charlie Flynn, decides to invest in the Wheeling Stamping project
- 2001 -- Wheeling Heritage contracted with Century Equities to conduct a Victorian Outlet Mall study which was funded from a foundation grant
- 2002 – Heidi Friend is hired as Executive Director
- 2003 -- The Board decided to abandon the Victorian Outlet Mall project
- 2004 -- The Board of Directors updated the Management Plan for the National Heritage Area
- 2005-- The Board decided to invest in a series of feasibility studies to assess the architectural feasibility of various restoration projects
- 2009 --Wheeling Heritage decided to evaluate and and renovate the Capitol Theatre
- 2010 – Jeremy Morris is hired as Executive Director
- 2014 – Wheeling Heritage completes three-year (2014-2017) strategic plan

- 2016 – Wheeling Heritage merges with Downtown Wheeling, Inc., the city’s Main Street program which strengthens the organization’s capability for revitalization of Wheeling
- 2016-- Jake Dougherty is hired as Executive Director
- 2017-- The Wheeling Heritage Board developed a new vision for the organization as a “catalyst for the revitalization of Wheeling” and published the 2017-2022 Strategic Plan in November, 2017

Perhaps the most dramatic change in the operations of Wheeling Heritage has been its shift from the pre-NHA designation period (prior to FY2001) to its operation as a National Heritage Area. During the pre-designation period, the Wheeling Heritage management, Executive Director Charlie Flynn, and board had access to sizeable sums of federal earmarked monies amounting to approximately \$28M between 1995 and 2006. The bulk of these funds were obtained prior to FY2000. During the pre-designation period, Wheeling Heritage was able to fund a number of construction and renovation projects largely without outside assistance. As those earmarked funds were discontinued, it became imperative for Wheeling Heritage to seek greater outside assistance for funding for larger projects and to shift its investments to focus on arts and on interpretative programs (such as Mt. Woods Cemetery and the Soldiers and Sailors Monument).

5.2.4 Monitoring and Record Keeping

ARCBridge has found Wheeling Heritage keeps consistent records across the years and makes changes to reflect the evolving requirements set forth by the National Park Service. The financial record-keeping appears to be in strong and stable condition. In fact, a good bit of the record-keeping stretches back to the pre-designation period.

ARCBridge has suggested one area of record-keeping which requires some modest investment related to tracking of partnerships. As part of this project, ARCBridge has worked with the Wheeling Heritage team to successfully refine its partner data set.

While the ARCBridge evaluation team recommends that Wheeling Heritage continue to track partner activity in the future, it should be noted that there have been no guidelines or requirement established by the National Park Service to track such information. In the future, if such information is carefully maintained by Wheeling Heritage, the organization will be better able to determine how rapidly they are able to develop new partners and to examine the role and value that each partner plays in their program offerings.

5.3 Partnerships

As noted in the beginning of this section, one key element of NHA sustainability is the development of partnerships with a diverse set of community stakeholders, which can support ongoing capacity development across the community. In Section 2 of this report ARCBridge documented the number of formal and informal partners (N=173) developed by Wheeling Heritage over the period between 2000 and 2016. These partnerships reflect organizations that have collaborated with Wheeling Heritage in that period of time and reflect key stakeholders in the community. Given Wheeling’s relatively small population, partnership organizations reflect contacts with a large portion of the residential and business population.

Analysis of the partnership data revealed that 52% of Wheeling Heritage’s partners have been actively involved with the NHA for seven years or more. These partner organizations reflect a long-term commitment to the success of Wheeling Heritage.

In section 2 of the report it was also observed that 26% of the partner organizations were involved in three or more discrete Wheeling Heritage programs. This group of partners reflects deep involvement with the Wheeling Heritage mission.

Over the course of interviews with partner organizations, members of the ARCBridge team heard a number of revealing comments about Wheeling Heritage’s role in the community. For example,

- “Wheeling Heritage is kind of a ‘blue chip’ organization”
- “WNHA is the central hub”
- “If you do programming in Wheeling, you run into Wheeling Heritage”
- “Without Wheeling Heritage, Wheeling would be a much colder, more detached place”

5.4 Financial Sustainability, the Importance of NPS Funds, and the Importance of the NHA Designation

Table 5.2 on the next page shows the total investments and total expenditures of Wheeling Heritage from the program’s beginning (FY2001) through FY2016.

The data shows that total expenditure during the period amounted to \$25.46M while the total revenue directly received by Wheeling Heritage amounted to \$26.72M.

These data also show that NPS HPP funds amounted to \$10.9M over the period. There was an additional \$6.5M in NPS “construction funds” during the early years of the program. Wheeling Heritage also obtained funds from NPS’s Save America’s Treasures grants of approximately \$200,000 in FY2014 and FY2015.

As described in Section 4 of this report, the total reported non-Federal “matching” funds generated by Wheeling Heritage was over \$6.9M. These matching funds exceeded required match levels for NPS funds by nearly \$4.1M.

The financial data outlined in Section 4 of this report highlights the importance of Heritage Program funds to the overall operation of Wheeling Heritage. Thus, HPP funds reflect more than 42% of the total funds received by the NHA. The congressionally earmarked funds and initial planning monies provided by the National Park Service set the stage for notable improvements in the economic conditions of Wheeling and established a framework for development in the site which has supported development since its designation as an NHA.

Without the NHA designation, HPP funds would not have been available to support the Wheeling Heritage program and the absence of those funds would have diminished efforts to revitalize downtown Wheeling. Furthermore, the designation as a National Heritage Area provided Wheeling Heritage with the stature in the community that it now enjoys.

Such stature has enabled the Wheeling Heritage organization to play a critical role in a number of preservation and educational developments in the community and support other organizations (e.g. the Conventions and Visitors Bureau) and the city in efforts to improve living, working, and cultural conditions in the downtown area.

FY	NPS Reported Funding Level	NPS Construction Funds	NPS Save Americas Treasures Grants	Other Federal Grants (Non-NPS)	Total Non-Federal Match	Total Investment in NHA	Total Expenditures
2001	593,000	2,200,000			504,783	3,297,783	3,979,714
2002	1,000,000	2,845,338		468,717	121,791	4,435,846	3,870,190
2003	576,000				375,838	951,838	1,050,973
2004	988,000				331,303	1,319,303	1,181,272
2005	888,000				363,157	1,251,157	1,283,138
2006	788,000	1,481,635		425,178	334,943	3,029,756	2,942,098
2007	631,433				354,900	986,333	1,059,884
2008	637,000				401,045	1,038,045	1,097,646
2009	637,000				386,662	1,023,662	1,052,358
2010	637,000				368,129	1,005,129	1,222,221
2011	613,000				365,061	978,061	891,367
2012	596,000				408,725	1,004,725	866,498
2013	528,000				543,853	1,071,853	978,114
2014	596,000		173,290		798,446	1,567,736	1,490,811
2015	596,000		25,497		621,308	1,242,805	1,217,506
2016	596,000				639,097	1,235,097	1,277,911
Total	10,900,433	6,526,973	198,787	893,895	6,919,041	25,439,129	25,461,701

Table 5.2: Wheeling Heritage NPS Funds, Other Federal Funds, Non-Federal Match Funds, Total Investment and Total Expenditures by Fiscal Year

If one looks at the total NPS investment in Wheeling Heritage, it is apparent that overall funding from the agency has declined since FY2006, which was the last year for earmarked funds. **From an investment/expenditure perspective, ARCBridge believes that Wheeling Heritage has effectively managed its expenditures in line with investments, particularly since 2012. Overall, the organization had investments in the amount of \$25.44M with expenditures of \$25.46M.**

Wheeling Heritage has maintained a strong financial footing for many years. The organization has developed methods of financial sustainability which has allowed them to accumulate unrestricted funds over an extended period of time and have maintained a tight operating expense budget.

This is evidenced by the accumulation of approximately \$250,000 of unrestricted cash reserves each year. The organization now maintains cash reserves that total in excess of \$1,300,000 as of the end of FY2017. The organization has no debt on their books as of September 30, 2017 and has Net Assets, as of this date, of \$5,320,967 (this includes a leasehold position in the Artisan Center).

5.5 Self-Sustaining Projects

Wheeling Heritage has endeavored to develop self-sustaining projects that raise monies or cover the costs of the projects.

These include the following:

1. Wheeling Stamping Building

This building houses the global back-office operation for the law firm, Orrick, Herrington & Sutcliffe. Due to its investment in the restoration of this property, Wheeling Heritage has a profit-sharing arrangement with the Regional Economic Development Partnership (RED) which yields net cash flow of \$145,000 annually.

2. Celtic Celebration

This is an annual heritage activity, which generates a gross of \$20,000 annually though sponsorships, vendor fees and admission fees.

3. Trek the Trail

Wheeling Heritage has received grants and contributions to sustain this program for the past four years. This program does not use HPP funds.

4. Show of Hands

This program is a crowd-sourcing activity which generates contributions that cover program and operational costs. Show of Hands generates approximately \$15,000 annually, which is awarded to the events' winners.

5. Wheeling Eats Brochure

This is a bi-annual brochure promotes independent restaurants in Wheeling. Restaurants pay a small fee to participate. The revenues exceed printing and design costs.

6. Mt. Wood Cemetery

This project receives contributions to restore the cemetery. The contributions are used to match grants. The contributions cover the costs of programming.

7. Artisan Center

Wheeling Heritage receives rents from tenants and sales proceeds from the gift shop. These revenues help to cover the operating costs.

5.6 Sustainable Economic Changes in Wheeling

In section 2 of this report, ARCBridge reported an economic analysis of changes in economic activity in Wheeling during the period between 2002 and 2012. This period coincides with major investments by Wheeling Heritage in the Wheeling urban area.

The data from that analysis were drawn from the Economic Census of 2002, 2007 and 2012. Those data indicated that over the period, the number of business establishments in Wheeling grew from 1,511 to 1,573 while the number of paid employees more than doubled between 2002 (7,573 paid employees) and 2012 (15,626 paid employees).

In addition, the value of business sales more than doubled between 2002 (\$707M) and 2012 (\$1.714B).

5.7 Sustainability Summary

The ARCBridge analysis of Wheeling Heritage sustainability suggests that the organization has a number of key elements that contribute long-term capability for sustaining its financial position:

1. Strong Board and Staff

First, the organization has a strong Board of Directors with representation of key elements of the community (such as the City, the County, the State and private enterprise) as well as staff that have shown their capability for fund-raising and financial management. The Board has been heavily involved in planning activities on behalf of the organization and has shown itself to be adept at managing through difficult periods of limited funding. The Board has also been proactive at identifying strategies that will serve the organization over the long-term (e.g. including the development of a strategic plan focused on revitalizing the city).

2. Strong Partnerships

Second, the organization has broadly developed a significant group of partner organizations (totaling 173), many of which have been undertaken multiple projects with Wheeling Heritage and have been associated with the organization for a number of years. This base of partner support offers the potential for numerous avenues for long-term fundraising and volunteer support.

3. Self-Sustaining Program

Third, Wheeling Heritage has developed a number of self-sustaining programs that do not rely upon HPP monies to continue their contributions to the community into the future.

4. Careful Fiscal Management

Fourth, Wheeling Heritage has a long track record of careful fiscal management that has produced \$1.3M in retained earnings since NHA designation and a track record of meeting and exceeding its federal match requirements.

5. Restoration of Downtown Buildings

Fifth, since its designation as a National Heritage Area, Wheeling Heritage has made significant multi-million dollar investments in renovating and restoring downtown buildings which has been associated with significant economic growth in terms of number of establishments, number of paid employees, and increasing business sales in Wheeling. In this way, Wheeling Heritage has clearly made a substantial contribution to the vitality of Wheeling.

Appendix 1

Evaluation Legislation

Excerpt(s) from Public Law 113-291
113th Congress

An Act To authorize appropriations for fiscal year 2015 for military activities of the Department of Defense, for military construction, and for defense activities of the Department of Energy, to prescribe military personnel strengths for such fiscal year, and for other purposes.

NOTE: Dec. 19, 2014 - [H.R. 3979]

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

SECTION 1. SHORT TITLE.

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

SEC. 3052. NATIONAL HERITAGE AREAS AND CORRIDORS.

(a) Extension of National Heritage Area Authorities.--

(1) Extensions.--

(A) Section 12 of Public Law 100-692 (16 U.S.C. 461 note; 102 Stat. 4558; 112 Stat. 3258; 123 Stat. 1292; 127 Stat. 420; 128 Stat. 314)

NOTE: 54 USC320101 note is amended--

(i) in subsection (c)(1), by striking `2015` and inserting `2021`; and

(ii) in subsection (d), by striking `2015` and inserting `2021`.

(B) Division II of Public Law 104-333 (16

U.S.C. 461 note) NOTE: 54 USC 320101 note. is amended by striking `2015` each place it appears in the following sections & inserting `2021`:

(i) Section 107 (110 Stat. 4244; 127 Stat. 420; 128 Stat. 314).

(ii) Section 408 (110 Stat. 4256; 127 Stat. 420; 128 Stat. 314).

(iii) Section 507 (110 Stat. 4260; 127 Stat. 420; 128 Stat. 314).

(iv) Section 707 (110 Stat. 4267; 127 Stat. 420; 128 Stat. 314).

(v) Section 809 (110 Stat. 4275; 122 Stat. 826; 127 Stat. 420; 128 Stat. 314).

(vi) Section 910 (110 Stat. 4281; 127 Stat. 420; 128 Stat. 314).

(C) Section 109 of Public Law 105-355 (16 U.S.C. 461 note; 112 Stat. 3252)

NOTE: 54 USC 320101 note. is amended by striking `September 30, 2014` and inserting `September 30, 2021`.

(D) Public Law 106-278 NOTE: 54 USC 320101 note. (16 U.S.C. 461 note) is amended--

(i) in section 108 (114 Stat. 818; 127 Stat. 420; 128 Stat. 314), by striking `2015` and inserting `2021`; and

(ii) in section 209 (114 Stat. 824), by striking the date that is 15 years after the date of enactment of this title` and inserting `September 30, 2021`.

(E) Section 157(i) of Public Law 106-291 (16

U.S.C. 461 note; 114 Stat. 967) <<NOTE: 54 USC 320101 note.>> is amended by striking `2015` and `2021`.

(F) Section 7 of Public Law 106-319 (16 U.S.C. 461 note; 114 Stat. 1284) <<NOTE: 54 USC 320101 note.>> is amended by striking `2015` and inserting `2021`.

(G) Title VIII of division B of H.R. 5666

(Appendix D) as enacted into law by section 1(a) (4) of Public Law 106-554 (16 U.S.C. 461 note; 114 Stat. 2763, 2763A-295; 123 Stat. 1294)

<<NOTE: 54 USC 320101 note.>> is amended--
(i) in section 804(j), by striking `the day occurring 15 years after the date of enactment of this title` and inserting `September 30, 2021`; and

(ii) by adding at the end the following:
`SEC. 811. TERMINATION OF ASSISTANCE.
`The authority of the Secretary to provide financial assistance under this title shall terminate on September 30, 2021.`.

(H) Section 106(b) of Public Law 103-449 (16 U.S.C. 461 note; 108 Stat. 4755; 113 Stat. 1726; <<NOTE: 54 USC 320101 note.>> 123 Stat. 1291) is amended, by striking `2015` and inserting `2021`.

(2) <<NOTE: 54 USC 320101 note.>> Conditional extension of authorities.--

(A) In general.--The amendments made by paragraph

(1) (other than the amendments made by clauses (iii) and (iv) of paragraph (1)(B)), shall apply only through September 30, 2020, unless the Secretary of the Interior (referred to in this section as the `Secretary`)--

(i) conducts an evaluation of the accomplishments of the national heritage areas extended under paragraph (1), in accordance with subparagraph (B); and

(ii) prepares a report in accordance with subparagraph (C) that recommends a future role for the National Park Service with respect to the applicable national heritage area.

(B) Evaluation.--An evaluation conducted under subparagraph (A)(i) shall--

(i) assess the progress of the local management entity with respect to--

(I) accomplishing the purposes of the authorizing legislation for the national heritage area; and

(II) achieving the goals and objectives of the approved management plan for the national heritage area;

(ii) analyze the investments of Federal, State, tribal, and local government and private entities in each national heritage area to determine the impact of the investments; and

(iii) review the management structure, partnership relationships, and funding of the national heritage area for purposes of identifying the critical components for sustainability of the national heritage area.

(C) Report.--Based on the evaluation conducted under subparagraph (A)(i), the Secretary shall submit to the Committee on Energy and Natural Resources of the Senate and the Committee on Natural Resources of the House of Representatives a report that includes recommendations for the future role of the National Park Service with respect to the national heritage area.

[...]

(c) National Heritage Area Redesignations.--

(1) Redesignation of the last green valley national heritage corridor.--

(A) In general.--The Quinebaug and Shetucket Rivers Valley National Heritage Corridor Act of 1994 (16 U.S.C. 461 note; Public Law 103-449) <<NOTE: 54 USC 320101 note.>> is amended--

(i) in section 103--(i) in section 103--

(I) in the heading, by striking `quinebaug

and Shetucket Rivers Valley National Heritage Corridor” and inserting “last green valley national heritagemcorridor”; and

(II) in subsection (a), by striking “the Quinebaug and Shetucket Rivers Valley National Heritage Corridor” and inserting “The Last Green Valley National Heritage Corridor”; and

(ii) in section 108(2), by striking “the Quinebaug and Shetucket Rivers Valley National Heritage Corridor under” and inserting “The Last Green Valley National Heritage Corridor established by”.

(B) References.--Any reference in a law, map, regulation, document, paper, or other record of the United States to the Quinebaug and Shetucket Rivers Valley National Heritage Corridor shall be deemed to be a reference to the “The Last Green Valley National Heritage Corridor”.

(2) Redesignation of motorcities national heritage area.--

(A) In general.--The Automobile National Heritage Area Act of 1998 (16 U.S.C. 461 note; Public Law 105-355) <<NOTE: 54 USC 320101 note.>> is amended--

(i) in section 102--

(I) in subsection (a)--

(aa) in paragraph (7), by striking “Automobile National Heritage Area Partnership” and inserting “MotorCities National Heritage Area Partnership”; and

(bb) in paragraph (8), by striking “Automobile National Heritage Area” each place it appears and inserting “MotorCities National Heritage Area”; and

(II) in subsection (b)--

(aa) in the matter preceding paragraph

(1), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; and

(bb) in paragraph (2), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”;

(ii) in section 103--

(I) in paragraph (2), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage Area”; and

(II) in paragraph (3), by striking “Automobile National Heritage Area Partnership” and inserting “MotorCities National Heritage Area Partnership”;

(iii) in section 104--

(I) in the heading, by striking “automobile national heritage area” and inserting “motorcities national heritage area”; and

(II) in subsection (a), by striking “Automobile National Heritage Area” and inserting “MotorCities National Heritage area”; and

(iv) in section 106, in the heading, by striking “automobile national heritage area partnership” and inserting “motorcities national heritage area partnership”.

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

Approved December 19, 2014.

LEGISLATIVE HISTORY--H.R. 3979:

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

CONGRESSIONAL RECORD, Vol. 160 (2014):

Mar. 11, considered and passed House.

Mar. 31, Apr. 1-3, 7, considered and passed Senate, amended. Dec. 4, House concurred in Senate amendment with an amendment. Dec. 12, Senate concurred in House amendment.

Appendix 2

Wheeling National Heritage Area Act Of 2000

July 12, 2000.--Ordered to be printed

Mr. Murkowski, from the Committee on Energy and Natural Resources, submitted the following

R E P O R T

[To accompany S. 2247]

The Committee on Energy and Natural Resources, to which was referred the bill (S. 2247) to establish the Wheeling National Heritage Area in the State of West Virginia, and for other purposes, having considered the same, reports favorably thereon with amendments and recommends that the bill, as amended, do pass.

The amendments are as follows:

1. On page 7, line 11, strike ``a''.
2. On page 8, line 19, strike ``loans or''.
3. On page 9, line 11, strike ``to''.
4. On page 10, after line 7, insert the following:

``(f) Revision of Plan.--Within 18 months after the date of enactment, the management entity shall submit to the Secretary a revised plan. Such revision shall include, but not be limited to--

- (1) a review of the implementation agenda for the heritage area;
- (2) projected capital costs; and
- (3) plans for partnership initiatives and expansion of community support."

5. On page 10, line 15 strike ``shall," and insert in lieu thereof ``may,"

6. On page 10, line 19, strike `` , LOANS''.

7. On page 10, line 22, strike ``loans and''.

8. On page 11, strike lines 21 and 22 and insert the following:

``(a) In General.--There is authorized to be appropriated to carry out this Act \$10,000,000, except that not more than \$1,000,000 may be appropriated to carry out this Act for any fiscal year.

``(b) Matching Funds.--Federal funding provided under this Act shall be matched at least 25 percent by other funds or in-kind services.

SEC. 9. SUNSET.

``The Secretary may not make any grant or provide any assistance under this Act after September 30, 2015.".

PURPOSE OF THE MEASURE

The purpose of S. 2247 is to establish the Wheeling National Heritage Area in the State of West Virginia and designate the Wheeling National Heritage Area Corporation as the management entity. The Secretary of the Interior is authorized to provide interpretive, technical, and financial assistance.

BACKGROUND AND NEED

The area in and around the city of Wheeling, West Virginia possesses important historical, cultural, and natural resources representing major heritage themes of transportation, commerce and industry, and the Victorian culture in the United States.

Wheeling served as the western terminus of the National Road of the early 1800's, was one of the few major inland ports during the nineteenth century, and played an important role in the industrial and commercial

heritage of the United States through the development of industries such as iron and steel, textile manufacturing, and others.

In 1990, the city of Wheeling, the Wheeling Community, and the State of West Virginia, with assistance from the National Park Service, formed the Wheeling Heritage Area Task Force to identify opportunities for conserving and developing the city's resources.

The Task Force produced the Wheeling Heritage Concept Plan, which explored Wheeling's history along with its many natural and cultural resources. In the spring of 1991, the Task Force commissioned a Development/Action Plan to determine how best to tell Wheeling's unique story using the city's heritage resources.

The plan provides the blueprint for the Heritage Area and recommends that Wheeling's significant resources and story be recognized through the establishment of the Wheeling National Heritage Area. Once completed, the operation of the Heritage Area is designed to be locally managed and financially self-sustaining.

LEGISLATIVE HISTORY

S. 2247 was introduced by Senator Byrd on March 9, 2000. Testimony from witnesses on this bill was included in the record of the hearing held by the Subcommittee on National Parks, Historic Preservation, and Recreation on May 25, 2000.

At its business meeting on June 7, 2000, the Committee on Energy and Natural Resources ordered S. 2247, as amended, favorably reported.

COMMITTEE RECOMMENDATION AND TABULATION OF VOTES

The Committee on Energy and Natural Resource

in open business session on June 7, 2000, by a unanimous vote of a quorum present, recommends that the Senate pass S. 2247, if amended as described herein.

COMMITTEE AMENDMENTS

During the consideration of S. 2247, the Committee adopted amendments which made several technical and clarifying changes. The amendments also incorporate several other provisions which have become standard in authorizations for other heritage areas. The provisions include a requirement that the management entity submit a management plan to the Secretary, that the heritage area be subject to standard appropriation ceilings and matching fund requirements, and that the authority for Federal financial assistance terminate 15 years after the date of enactment.

SECTION-BY-SECTION ANALYSIS

Section 1 designates the bill's short title as the "Wheeling National Heritage Area Act of 2000." Section 2(a) contains congressional findings. Subsection (b) describes the purposes of the Act.

The purposes are as follows: (1) to recognize the importance to the Nation of the history and development of the Wheeling area; (2) to provide a framework to assist the city of Wheeling and other entities to preserve, enhance, and interpret the area's resources; (3) to provide limited Federal, State, and local financial assistance for planning and infrastructure; and (4) to provide for an economically self-sustaining National Heritage Area that is not dependent on Federal funding beyond its initial years.

Section 3 defines key terms used in the Act. Section 4(a) establishes the Wheeling National

Heritage Area. Subsection (b) designates the management entity for the heritage area as the Wheeling National Heritage Area Corporation.

Section 5(a) describes the primary mission of the management entity in implementing and coordinating the recommendations of the 1992 Plan for the Wheeling National Heritage Area, and in directing and coordinating the interpretation, conservation, and development of the heritage area's resources.

Subsection (b) directs the management entity to work with the State and local governments to ensure that the plan is formally adopted by the city of Wheeling and recognized by the State.

Subsection (c) describes the specific responsibilities of the management entity with respect to implementing the plan.

Subsection (d) describes the authority of the management entity with respect to the use of Federal funds made available under the Act. The management entity may make grants, enter into cooperative agreements, and provide technical assistance to Federal agencies and State, city, or other public or private organizations, and may hire and compensate staff. The management entity may also obtain money from any source under any program or law requiring them to make a contribution in order to receive the money, and may spend funds on promotion and marketing and to contract for goods and services.

Subsection (e) prohibits the management entity from acquiring and real property or interest therein, other than leasing of facilities, except by gift or devise, or with money that is made available to the management entity on the condition that it be used to purchase real property or interest therein within the heritage area. Any property so acquired must be conveyed by the management entity, as soon as practicable, to an appropriate public or private entity on the condition that it will be used for public purposes.

Subsection (f) requires the management entity to submit a revised management plan for the Heritage Area to the Secretary within 18 months after the date of enactment of this Act.

Section 6 authorizes the Secretary of the Interior to assist the management entity by providing interpretive, planning, educational, and staffing support, and exhibits and other material support. The Secretary is also authorized to provide technical assistance, make grants, and enter into

cooperative agreements with the management entity, the State, city, non-profit organizations or any person. No amendments to the management plan may be made without the Secretary's approval.

Section 7 requires all Federal agencies conducting or supporting activities that directly affect the heritage area to consult, cooperate, and coordinate with the Secretary and the management entity to the extent practicable, and to conduct their activities in a manner that will not have an adverse effect on the heritage area.

Section 8 authorizes the appropriation of \$10 million, with a \$1 million limit for any fiscal year, subject to a 25 percent match of funds or in-kind services.

Section 9 terminates the authority of the Secretary to make any grant or provide any assistance under this Act after September 30, 2015.

Cost and Budgetary Considerations

The following estimate of costs of this measure has been provided by the Congressional Budget Office:

U.S. Congress,
Congressional Budget Office,
Washington, DC, June 16, 2000.
Hon. Frank H. Murkowski, Chairman,
Committee on Energy and Natural Resources,
U.S. Senate, Washington, DC.

Dear Mr. Chairman:

The Congressional Budget Office has prepared the enclosed cost estimate for S. 2247, the Wheeling National Heritage Area Act of 2000. If you wish further details on this estimate, we will be pleased to provide them. The CBO staff contacts are Deborah Reis (for federal costs), and Jean Wooster (for the private-sector impact).

Sincerely,

Barry B. Anderson
(For Dan L. Crippen, Director).

Enclosure.

S. 2247--Wheeling National Heritage Area Act of 2000

S. 2247 would establish the Wheeling National Heritage Area in Wheeling, West Virginia. The bill would designate the Wheeling National Heritage Corporation as the management entity for the area and direct this nonprofit organization to implement a previously developed management plan. The corporation would provide financial and technical assistance to state and local agencies and other entities. The Secretary of the Interior would provide technical assistance to the corporation and approve or disapprove any amendments to the management plan.

For these purposes, the bill would authorize the appropriation of \$10 million, not to exceed \$1 million annually over the next 15 years.

Assuming appropriation of the authorized amounts, CBO estimates that implementing S. 2247 would cost \$10 million over the next 10 to 15 years. The bill would not affect direct spending or receipts; therefore, pay-as-you-go procedures would not apply. S. 2247 contains no intergovernmental mandates as defined in the Unfunded Mandates Reform Act (UMRA) and would impose no costs on state, local, or tribal governments.

S. 2247 would impose private-sector mandates, as defined by UMRA, on the Wheeling National Heritage Area Corporation. The costs of the mandates would fall well below the annual threshold established by UMRA for private-sector mandates (\$109 million in 2000, adjusted annually for inflation).

The bill would require the corporation, as the management entity for the Heritage Area, to implement the current management plan for the area and to submit a revised management plan to the Secretary of the Interior for approval.

The bill also would require that the management entity assist local governments and other organizations in activities related to purposes of the area.

S. 2247 also would impose specific prohibitions on the management entity in the manner in which they may acquire real property. According to the corporation, it currently complies with most of the requirements in the bill.

Further, based on information from the corporation and government sources, the restrictions related to acquiring property would not prevent the corporation from pursuing any planned purchases or activities for the area. Thus, CBO estimates that the costs of the mandates would fall well below the annual threshold established by UMRA for private-sector mandates.

The CBO staff contacts for this estimate are Deborah Reis and Ali Aslam (for federal costs), and Jean Wooster (for the private-sector impact). The estimate was approved by Peter H. Fontaine, Deputy Assistant Director for Budget Analysis.

REGULATORY IMPACT EVALUATION

In compliance with paragraph 11(b) of rule XXVI of the Standing Rules of the Senate, the Committee makes the following evaluation of the regulatory impact which would be incurred in carrying out S. 2247.

The bill is not a regulatory measure in the sense of imposing Government-established standards or significant economic responsibilities on private individuals and businesses.

No personal information would be collected in administering the program. Therefore, there would be no impact on personal privacy.

Little, if any, additional paperwork would result from the enactment of S. 2247, as ordered reported.

EXECUTIVE COMMUNICATIONS

On, May 23, 2000, the Committee on Energy and Natural Resources requested legislative reports from the Department of the Interior and the Office of Management and Budget setting forth Executive agency recommendations on S. 2247. These reports had not been received at the time the report on S. 2247 was filed. When the reports become available, the Chairman will request that they be printed in the Congressional Record for the advice of the Senate. The testimony provided by the National Park Service at the Subcommittee hearing follows:

Statement of Katherine Stevenson, Associate Director for Cultural Resources Stewardship and Partnerships, National Park Service, Department of the Interior

Mr. Chairman, thank you for the opportunity to appear before your committee today to present the views of the Department of the Interior on S. 2247, to establish the Wheeling National Heritage Area in Wheeling, West Virginia.

The Department supports S. 2247, if amended as recommended by this testimony. The Administration objects to the bill's loan authority, which is not consistent with the letter or the spirit of the Federal Credit Reform Act of 1990.

S. 2247 would provide the formal legislative charter for a heritage area which is already established and has received support from Congress for the last decade through annual appropriations. This legislation would establish the Wheeling National Heritage Area and designate the Wheeling National Heritage Area Corporation (WNHAC), a non-profit corporation chartered in the State of West Virginia, as the management entity for the heritage area.

It would require WNHAC to implement and coordinate the recommendations contained in the August 1992 Plan for the Wheeling National Heritage Area, ensure integrated operation of the heritage area, and conserve and interpret the historic and cultural resources of the heritage area. The legislation would authorize funding appropriated by Congress to be used by the WNHAC for such purposes as making loans or grants, paying staff, and doing promotion and marketing.

As is the case with other areas that have been designated as national heritage areas by Congress, the city of Wheeling is a place where natural, cultural, historic, and scenic resources combine to form a cohesive, nationally distinctive landscape arising from patterns of human activity that are shaped by geography. Through the development and maintenance of many industries crucial to the nation's expansion, including iron and steel, textile manufacturing, boat building, glass manufacturing, and tobacco manufacturing, Wheeling has played an important role in the industrial and commercial heritage of the United States. Today, a mix of nationally, regionally, and locally significant sites illustrate an important chapter in United States history.

Federal support for the effort to identify and conserve cultural resources in Wheeling began with the development of the 1990 Concept Plan for the Wheeling Area, with which the National Park Service assisted. That document, which included a statement of national significance for the area, encouraged Congress to appropriate funds for the development of a management action plan and other early initiatives.

The Wheeling National Heritage Area was one of our nation's first heritage areas to complete a management plan and receive ongoing technical assistance from the National Park Service.

The Wheeling National Heritage Area plan, completed in 1992, provided an inventory of the area's resources, recommended policies for resource management and interpretation, and set forth a program for plan implementation. For the past eight years, this plan, which was approved by the National Park Service, has guided WNHAC in its pursuit of appropriations and the expenditure of those funds to implement projects.

The Wheeling National Heritage Area Corporation has been successful in completing a number of large projects that were described in their plan, including:

- the renovation of an historic warehouse into a restaurant/museum/retail area;
- the construction of a five-story intermodal transportation center that includes a visitor center with interpretive exhibits;
- the design and implementation of the first phase of the Wheeling Heritage Port--a new focal point for the city and an attempt to reestablish river traffic back to downtown Wheeling;
- the renovation and lighting of the Wheeling Suspension bridge, a national historic landmark;
- the development of interpretive exhibits in West Virginia Independence Hall, also a national historic landmark

and many more smaller community-based and historic preservation projects. Wheeling has been fortunate to have superb local leadership, community support, and ongoing technical assistance from the National Park Service. In addition, the funds appropriated by Congress have encouraged investment by the private sector as well as matching funds from the city and the state. In a relatively short amount of time, the work that has been done as a result of

having a national heritage area plan and a commission to implement it has made a real impact on the preservation of the city's cultural resources and in the quality of life that Wheeling-area residents enjoy.

While we support enacting legislation to authorize the Wheeling National Heritage Area, we recommend six changes to S. 2247 as introduced.

First, we object to the authority in section 5(d)(1) for the management entity to use Federal funds to make loans to various entities. No criteria or administrative guidelines have been developed for heritage areas to ensure that the taxpayers' funds are being used properly. For management entities with limited administrative resources, it would be an administrative burden to set up payment schedules, underwriting, and loan servicing sufficient to provide confidence that a loan program is using Federal funds in an accountable manner. We believe there are more effective ways for management entities to use limited Federal funds than creating loan programs.

Second, we strongly object to the authority in section 6(c) for the Secretary to make loans to the management entity. Such loans would be subject to the Federal Credit Reform Act of 1990, so it would require a significant investment to administer the loans, estimate subsidy costs, and track loan payments. This would impose a new burden on the National Park Service, which does not have this capability, and would not be cost-effective for such a small program. Establishing such a loan program without reference to the Federal Credit Reform Act or the capacity to implement those procedures is not consistent with recent credit reform efforts.

Third, we recommend requiring that the Wheeling National Heritage Area plan be updated and submitted to the Secretary of the Interior within 18 months of enactment of the bill.

Under a requirement to update the plan, WNHAC would review their original implementation agenda and projected capital costs, and consider proposals for new partnership initiatives that may not have been considered in the original document.

Updating the plan would give the WNHAC a formal opportunity to take stock of what has been accomplished, how the priorities of the community have evolved, and how community support for the heritage area can be broadened.

Fourth, we recommend that section 6(b) be revised so that the Secretary may, not shall, provide technical assistance. There may be instances, such as the unavailability of appropriated funds, where we cannot provide all of the technical assistance requested by the management entity.

Fifth, we recommend changing the authorization of funding for the Wheeling National Heritage Area to make it consistent with the funding provisions that Congress typically has used in establishing other national heritage areas. The bill as introduced provides for the authorization of "such sums as may be necessary" for the heritage area. We recommend that the bill authorize not more than \$1,000,000 for any fiscal year, and not more than a total of \$10,000,000 over 15 years. We also recommend a 50 percent non-Federal match requirement.

Finally, we recommend that the Secretary's authority to provide assistance terminate in 2015. Adding this sunset provision, like the authorization provisions suggested above, would make this legislation consistent with other legislation Congress has passed in recent years.

Amendments reflecting these proposed changes are attached to this statement.

Mr. Chairman, that concludes my statement.

I would be pleased to answer any questions you or other members of the Subcommittee may have. Amendments to S. 2247, Wheeling National Heritage Area, Proposed by the National Park Service Page 6, line 3, insert "Area" after "Heritage". [technical amendment]

Page 8, line 19, strike "loans or".

Page 10, after line 7, insert the following:

"(f) Revision of Plan.--Within 18 months after the date of enactment, the management entity shall submit to the Secretary a revised plan. Such plan shall include, but not be limited to--

"(1) Review of the implementation agenda for the heritage area;

"(2) Projected capital costs; and

"(3) Plans for partnership initiatives and expansion of community support."

Page 10, line 15, strike "shall," and insert in lieu thereof "may,".

Page 10, line 19, strike ", LOANS".

Page 10, line 22, strike "loans and".

Page 11, strike lines 21 and 22 and insert the following:

"(a) In General.--There is authorized to be appropriated to carry out this Act \$10,000,000, except that not more than \$1,000,000 may be appropriated to carry out this Act for any fiscal year.

"(b) 50 Percent Match.--The Federal share of the cost of activities carried out using any assistance or grant under this Act shall not exceed 50 percent."

Page 11, at end of bill, add the following:

"SEC. 9. SUNSET.

"The Secretary may not make any grant or provide any assistance under this Act after September 30, 2015."

CHANGES IN EXISTING LAW

In compliance with paragraph 12 of rule XXVI of the Standing Rules of the Senate, the Committee notes that no changes in existing law are made by the bill S. 2247, as ordered reported.

Appendix 3

Evaluation Methodology

Background and Purpose

In May 2008, Congress passed legislation which requires the Secretary of the Interior to evaluate the accomplishments of nine National Heritage Areas (NHAs) no later than three years before the date on which authority for Federal funding for each of the NHAs terminates. Based on findings of each evaluation, the legislation requires the Secretary to prepare a report with recommendations for the National Park Service's future role with respect to the NHA under review.

The NHA evaluation process was designed to answer the following questions:

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

ARCBridge's methodology for conducting the NHA evaluations includes: our core evaluation approach; evaluation design; associated data collection methods, sources, and measures; analysis and reporting plans, and in-depth site interviews. The methodology builds upon the methodology and instruments used in previous NHA evaluations. In addition, the ARCBridge team has included case studies, profiles of key community partners, and photos to further illustrate the impact on the ground.

This document also describes the process ARCBridge 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).

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

ARCBridge has developed a core evaluation design to be tailored for each NHA evaluation. Three tools guide the development of the core evaluation design: the NHA Logic Model, the NHA Domain Matrix (Appendix D), 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
- the linkages among the activities, strategies, and outcomes

NHA Logic Model

The logic model provides a blueprint for the case study design, outlining the components to examine, the indicators to measure, and the relationships to investigate between the various activities and outcomes. It 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:

Evaluation Question 1

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

In addressing this question, ARCBridge will collect data through interviews and documents on the nature of the proposed NHA activities; how these activities are being implemented by the local coordinating entity/management entity, partnership network and/or the local community; and, the impacts of the activities. The measures also will address whether the NHAs are implementing the activities proposed in the initial NHA designation, and if not, what circumstances or situations may have led to their adaptation or adjustment.

This examination consists of in-depth interviews with staff to understand what activities have resulted from the NHA designation that was initially not intended or expected. Also, in assessing the goals and objectives of the NHA, we will try to discern if there were mechanisms in place prior to establishment of the NHA intended to achieve these goals.

Evaluation Question 2

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

Addressing this question will begin with gathering information through interviews with key NHA management staff and a review of financial data forms. Understanding what investments have been made will involve collecting data on both financial and non-financial investments, including data on the amount, nature, and sources of these investments over time. 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, ARCBridge 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.

Evaluation Question 3

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

Data to inform this question will be primarily gathered from interviews with key NHA management staff and a subset of NHA partners, and by performing a review and analysis of the NHA financial documents. The definition of sustainability developed by the NPS working group will be employed in addressing this question. We will examine the nature of management structure 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 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 be effected by the sunset of Federal funds, and if there are mechanisms in place for these organizations to work toward the Heritage Area goals post-sunset.

Data Collection Methods

The planned data collection methods include: topic-centered interviews; topic-centered interviews with 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 ARCBridge 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 to conduct/produce routine NHA business

Another set of documents will be obtained and reviewed to understand the nature of NHA activities and their relationship with NHA objectives. These documents include: The National Heritage Area coordinating entity's continuing ability to work collaboratively and reciprocally with Federal, state, community and private partners through changing circumstances to meet its mission for resource conservation and stewardship, interpretation, education, recreation and economic development of nationally significant resources.

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

- Coordinating entity and the National Park Service honoring the legislative mandate of the National Heritage Area;
- Coordinating entity's management capacity including governance, adaptive management (such as strategic planning), staffing and operations;
- Financial planning and preparedness, including the ongoing ability to leverage resources in support of the local network of partners;

- Partnering with diverse community stakeholders including serving as a hub, catalyst and/or coordinating entity for ongoing capacity building, communication and collaboration among local entities
- Program and project stewardship where the combined investment results in the improved economic value and ultimately long-term quality of life of that region; and
- Outreach and marketing to engage a full and diverse range of audiences
- Guides – documents designed to define how NHA business operates
- Annual financial statements and reports – includes audits, tax returns, budget activities and performance program reports
- Annual reports – includes reports to Congress, to partners and to the NPS and others
- Organizational structure and operations – how the coordinating entity, board(s) and committees do NHA work, their roles and functions
- Key milestones – a timeline of major events that document the evolution of the NHA to include outside influences affecting your planning and implementation process

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

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

Financial Data Review

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 function. 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 one day interviewing up to nine staff in each NHA.

Topic-Centered Interviews with Members of the NHA Partner Network

Members of the NHA partner network, including NPS, will be interviewed in order to gain an understanding about NHA activities and investments and their associated impacts, including their contribution to NHA sustainability. A topic-centered, semi-structured interview protocol will guide these 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, ARCBridge will contact the partners for interview scheduling. We expect to have a range of stakeholders and organizations participate in these interviews adding to the multiple sources of data for triangulation.

Community Input

Members of the NHA community will be invited to provide their input about the nature and impact of NHA activities through intercept conversations with a sample of residents in the NHA community. These conversations may take place

within the community. Conversations will help the evaluation team gain an understanding of the community's familiarity with the Heritage Area and its unique and nationally significant aspects. The intercept conversations will also provide information about the residents' awareness of and appreciation for the Heritage Area. ARCBridge will work with NHA management 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 first begin by summarizing the data within each domain area, first within each source, and then synthesizing the data across sources. Attempts will be made to reconcile any issues or discrepancies across the sources by contacting the relevant parties at each NHA. Data will be summarized within each domain and analyzed for relationships, guided by the logic model. To the degree possible, results will be displayed graphically and in tables. Findings will reflect the triangulated information – where appropriate and feasible, it will be important to ensure that the results not only reflect the perspectives of the key informants but are substantiated with data from documents.

Results of each NHA evaluation will be communicated in a Findings Document. The findings document will be guided by a modification of the outline finalized by the NHA Evaluation Working Group. The Findings Document outline has been streamlined to present key findings in an Executive Summary, combine sections according to the three evaluation questions, and address sustainability questions regarding the impact of the sunset of Federal funds on NHA activities.

ARCBridge will first share a draft of the findings document with the Executive Director of the NHA coordinating entity for a review of technical accuracy. The Executive Director will have the opportunity to share the findings document with other staff and stakeholders as desired, and can provide comments to the evaluation team, either in writing or via telephone discussion. Finally, if necessary to discuss differences, a joint telephone conversation involving the NHA Executive Director, NPS and ARCBridge can be held to discuss the comments and to arrive at a resolution. Once ARCBridge has incorporated the feedback, the NHA coordinating entity will have another opportunity to review the findings document before it is shared with NPS. Once the NHA's final feedback is reviewed and incorporated, ARCBridge will submit the draft findings documents to NPS for review.

Tailoring the Evaluation Design for NHA Evaluation Sites

The core evaluation design will be tailored to individual NHAs under evaluation. A preliminary "Meet and Greet" visit to the NHAs will largely inform how the protocols should be customized for each site, including the domains that are relevant, the probes that should be added to inquire about each domain, and the specific data sources that are relevant for the site. 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 two days of travel and meeting time .

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

Interview data collection for each NHA evaluation will occur during a second visit to each NHA site, and is expected to last three to five 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.

ARCBridge will also work with each NHA during the second site visit, and with email and phone communications post site-visit, to collect and analyze information for the financial review. The financial data protocol will provide the NHA coordinating entity with an understanding of the data 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, ARCBridge has tried to ensure this evaluation methodology thoroughly addresses the three research questions. However, there are parameters to this methodology that result in a few limitations on evaluation findings. In some instances, there is a trade-off between maximizing the time and efficiency for the evaluation and the ability to thoroughly collect information from a range of stakeholders. For instance, to obtain input from community stakeholders, a survey is not possible within the current evaluation due to OMB Paperwork Reduction Requirements. Therefore, the data received from intercept conversations will be a more qualitative assessment of the community's perceptions of the NHA.

As noted, limitations to the community input include convenient, rather than representative, samples of tourists, local residents, and volunteers, and impressionistic rather than quantitative data on the impact of the NHA on stakeholder knowledge, attitudes, and involvement in the NHA. Therefore, the data obtained will have to be viewed with these limitations in mind.

Appendix 4

Domain and Source Crosswalk

Research Question, Domains, Measures							
Evaluation Q.1: Has the NHA achieved the purposes of the authorizing legislation and achieved the goals and objectives of the management plan?	NHA Management Interviews	Partner Interviews/staff at program sites	Reps of the Community and on-site visits	Strategy plans, Marketing plans, Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
Nature and scope of WNHA activities							
Description of preservation, interpretation, and education activities	x	x		x	x		
Do WNHA Programs cover the full range of anticipated programs?	x	x	x	x	x	x	x
Implementation of activities/ programs							
· Role of WNHA	x	x		x	x		x
· Role of admin staff	x	x		x	x		
· Role of partners	x	x		x	x		x
· Role of community	x	x		x	x		
Is there strong involvement from all anticipated parts of the community?	x	x	x		x		x
Assess Impact of activities							
Development that is successful in meeting objectives	x	x	x	x	x	x	
Increased awareness	x		x		x		
Heightened visibility of WNHA resources and stories		x	x	x			
Economic Impact / Job creation	x	x			x	x	

Table A.4.1: Q1 Domain Matrix

Research Question, Domains, Measures	NHA Management Interviews	Partner Network Interviews/ staff at program sites	Reps for the Community and on-site visits	Strategy plans, Marketing plans), Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
Evaluation Q.2 What have been the impacts of investments made by Federal, State, Tribal, and local government and private entities?							
Consistency of donor support	x	x				x	x
Expansion of base of donors over time	x			x		x	x
Economic Impact / Job creation	x			x	x	x	
Describe Other types of investment							
Partnership contributions (e.g., time, staff, resources)	x	x		x		x	x
Community contributions (e.g., volunteerism)	x	x	x	x			x
Other In-Kind donations	x	x				x	x
Assess Impact of other investment sources							
Educational impacts	x	x		x			
Marketing and promotional	x	x	x	x		x	
Staff enhancement and retention	x	x		x		x	
Land/facilities acquisition	x	x		x		x	
Economic Impact /Job creation	x					x	

Table A.4.2: Q1 Domain Matrix

Research Question, Domains, Measures							
	NHA Management Interviews	Partner Network Interviews/ staff at program sites	Reps for the Community and on-site visits	Strategy plans, Marketing plans), Legal Documents	NHA Guides, Brochures, Web Sites, reports and statistics	Financial Data	Partner Data
Evaluation Q.3 How does the NHA management structure, partnership relationships and current funding contribute to its sustainability?							
Growth and development of partner networks	x	x		x			x
Transparent and effective communication channels with governance, staff, volunteers, partners, etc.	x	x		x	x		
Established and consistent communication mechanisms with partners, members and local resident	x	x	x	x	x		x
WNHA has leadership role in partnering	x	x					x
Describe nature of partner network	x	x	.	x			x
List of partners	x					x	x
Purpose of each partnership	x	x					x
Partners' involvement with WNHA	x	x					x
Resource commitment from partners	x	x				x	x
Assess Partner network's sustainability	x	x				x	x
Broad base of partners representing diverse interests and expertise in the WNHA	x	x					x
Partner collaboration and combination of investments to accomplish WNHA objectives	x	x				x	x

Table A.4.3: Q3 Domain Matrix

Appendix 5

Community Intercept Survey

Hello!

I am working on an evaluation project for the Wheeling National Heritage Area, part of the National Park Service. We are speaking with a few visitors in the Wheeling area to develop an understanding of what consumers know about the Wheeling National Heritage Area. Do you have a couple of minutes to talk with me? Thank you.

1. Are you from the local area or are you from somewhere else? Where are you from?
2. How did you find out about this program? Advertising, hotel, on the local news or the newspaper? Word of mouth? The Internet? Wheeling signage?
3. Did you learn about this program when you arrived in town or before that?
4. Is this your first visit or have you been here before?
5. What have you learned from this site?
 - Historical info
 - Cultural or artistic information
 - About nature
6. Had you previously known about the Wheeling National Heritage Area? If so, what did you know?
7. Have you visited other NHAs?
8. Did you look at:
 - Brochures,
 - Signage
 - The National Heritage website
 - Themes of the NHA
 - Role of the NHA in the community?
9. What did you learn from these materials?
10. How likely are you to tell others that you know about this location? What would you tell them?
11. Would you encourage people you know to come here? Why?