

BACKGROUND

Maryland's [Heritage Preservation and Tourism Areas Development Program](#) is administered by the Maryland Heritage Areas Authority (MHAA), which was created in 1996 with the passage of *Maryland House Bill 1*.¹ The Maryland Heritage Areas Program's goals include developing a local plan and program to accomplish the following:

- Enhance visitor appeal and enjoyment of the state's history, culture, natural environment, and scenic beauty by improving the overall product of the visitor experience.
- Increase economic activity for tourism, creating opportunities for small business development, job growth, and a stronger tax base.
- Encourage preservation and adaptive reuse of historic buildings, conservation of natural areas important to the state's character and environment, and the continuity and authenticity of cultural arts, heritage attractions, and regional traditions.
- Enable Marylanders and visitors from out of state alike to have greater access to and understanding of the state's history and cultures and to understand the important events that took place here.
- Foster links among and between heritage attractions that encourage visitors to explore, linger, and sample the diverse offerings of the state's distinctive regions.
- Balance the impact of tourism activity with residents' quality of life.
- Accomplish these goals via partnerships among local and regional leaders, nonprofit organizations, businesses, and state agencies.



SOURCE: Peter Johnston & Associates

MARYLAND'S HERITAGE AREAS PROGRAM



The first step in the Program's process is to become a *Recognized Heritage Area (RHA)*, which includes the development of a Recognized Heritage Area Plan and Application. Once official RHA status is granted by the state, the next step is to

become a *Certified Heritage Area, (CHA)*, which requires the preparation of a detailed "Heritage Area

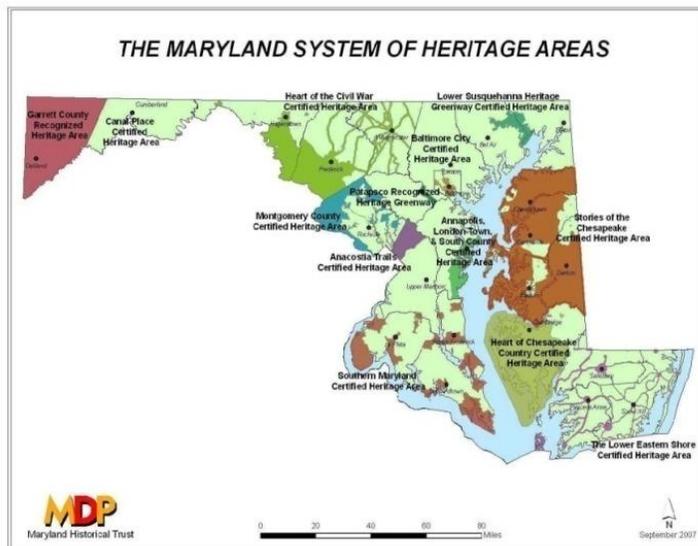
¹ Maryland Heritage Areas Authority; *The Maryland Heritage Preservation and Tourism Areas Program Guide*; 1996.

Management Plan” (Heritage Plan). The purpose of this process is to form a strategic blueprint for action regarding a future CHA. The Plan assists the eventual Heritage Area Management Entity to fulfill program requirements and ensure a return on investment of public dollars by enhancing heritage preservation and tourism. Local governments must endorse the Heritage Plan by adopting it into their respective comprehensive plans. Endorsement entails an agreement to act on the Heritage Plan’s recommendations for local government partners if the region becomes a Maryland CHA.

REQUIREMENTS FOR A HERITAGE AREA MANAGEMENT PLAN

To become a CHA, the Heritage Plan must meet the requirements of Maryland House Bill 1, as reflected in guidelines published by the Maryland Heritage Areas Authority (MHAA) for jurisdictions participating in the Maryland Heritage Areas Program. Specifically, the Heritage Plan must contain the following elements:

- **Vision and Goals:** A “vision” and statement of goals in relation to the implementation of the Heritage Plan (what does the Plan seek to achieve?);
- **Heritage Significance:** A discussion of the area’s heritage significance;
- **Heritage Resources:** A synopsis of the area’s heritage resources, including historical, cultural, natural, archeological, and scenic resources, as well as resources involved in some aspect of heritage tourism;
- **Market Analysis for Heritage Tourism:** An inventory of visitor services within the Heritage Area and analysis of the present and future market for tourism experiences.
- **Development and Land Use:** An assessment of current development and land use issues/trends related to the protection of heritage resources, including local government policies and regulations as well as the condition of heritage resources, market forces affecting the region, and an assessment of mechanisms for land stewardship;
- **Interpretation:** An overview and assessment of interpretive resources and programs to explain the “story” of the region (heritage themes);
- **Linkages:** An evaluation of key heritage resource linkages;
- **Leadership and Organization:** An assessment of the leadership and organizations involved in heritage tourism and economic development.
- **Economic Development and Marketing Plan:** A plan to highlight core heritage-related industries and recommend ways to improve performance and viability.



SOURCE: Maryland Heritage Areas Authority and the Maryland Department of Planning

PRODUCING AN ACTION PLAN

The culmination of state requirements is to produce an “Action Plan” that presents strategies for enhancing heritage resources to achieve optimum visitation, improve physical linkages (roads, trails, river routes, etc.) and non-physical linkages (package tours, visitor services, passport ticketing, etc.), advance compatible economic development strategies, and provide for the stewardship and preservation of key resources. Finally the Plan must contain the following recommended implementation strategies or actions:

- Capital projects and programs;
- Cost estimates and sources of funds;
- An assessment of economic performance (Return on Investment);
- A recommended management platform; and
- Identification of Certified Heritage Area (CHA) and Target Investment Zone (TIZ) boundaries.

THE CERTIFIED HERITAGE AREA AND TARGET INVESTMENT ZONES

Two of the most critical elements in preparing a Heritage Plan are defining the Certified Heritage Area (CHA) boundary and Target Investment Zones (TIZs) because these represent the areas where funding will be concentrated.²

Certified Heritage Area Boundaries: CHAs are delineated geographic boundaries within a Heritage Area containing high concentrations of heritage resources. Heritage resources are defined as unique concentrations of historical, cultural, archeological, natural, and scenic resources. Ideal CHAs are areas where public and private partners are committed to the protection and development of heritage resources for compatible economic development and heritage tourism. CHAs must be defined in the planning process and may be contiguous or non-contiguous. The criteria for CHA boundary delineation include the following:

1. The area within a CHA must contain a significantly high concentration of heritage resources, which are attracting or have considerable potential to attract tourists.
2. Available incentives must be capable of increasing tourism within the CHA to produce measurable preservation and economic development through tourism.
3. Local governments and private interests must be prepared to commit resources to heritage preservation and tourism development in the CHA.
4. The CHA boundary should overlap, to the maximum extent possible, with other local, state, and federal revitalization designations such as special taxing districts, historic districts, National Register Historic Districts, Enterprise/Empowerment Zones, designated revitalization areas, Maryland Main Street designations, state Priority Funding Areas – PFAs, Rural Legacy Areas, etc.

² Maryland Heritage Areas Authority; *Guidelines for Establishing Certified Heritage Areas*; 1996.

5. Proposed CHA boundaries should be configured to facilitate the collection of performance measurement data, as required by the state’s Heritage Areas Program.

Target Investment Zone Boundaries: In addition to CHA boundary delineation, the heritage planning process must establish *Target Investment Zones* (TIZs) within CHAs. TIZs are specific priority areas where the Heritage Area Management Entity will attempt to attract significant investment and return on public investment (ROI). TIZs may be contiguous or non-contiguous within the CHA. The criteria for TIZ boundary delineation include the following:

1. The TIZ must have a high potential to leverage private investment and expenditures.
2. Program incentives must be capable of assisting and leveraging private investment to produce measurable preservation and economic development through tourism.
3. The boundary for a TIZ should overlap, to the maximum extent possible, with other local, state, and federal revitalization designations such as special taxing districts, historic districts, National Register Historic Districts, Enterprise/Empowerment Zones, designated revitalization areas, Maryland Main Street designations, State Priority Funding Areas – PFAs, Rural Legacy Areas, etc.
4. Certified Heritage Structures within a CHA/TIZ should be identified (includes listed and non-listed/non-designated historic structures in a TIZ proposed as Certified Heritage Structures eligible for Heritage Preservation Tax Credits).
5. Local governments and private interests must be prepared to commit resources to preservation and tourism development in the TIZ.
6. Proposed TIZ boundaries should be configured to facilitate the collection of performance measurement data, as required by the Heritage Area Program.

MARYLAND HERITAGE AREA PLANNING

Maryland Preservation Plan: The [2005 Maryland Preservation Plan](#) defines major priorities for the state in regards to heritage preservation. This includes a host of prominent issues facing Maryland in the 21st century, such as growth management, neighborhood revitalization, economic development, the environment, and sustainability. In terms of historic and cultural resources the state has focused on three elements: 1) heritage resource protection; 2) heritage tourism; and 3) heritage resource education. Goals from the Preservation Plan include the following:

GOAL 1: Effectively manage growth by encouraging neighborhood revitalization;

GOAL 2: Stimulate economic development through heritage tourism;

GOAL 3: Increase public awareness and appreciation of Maryland’s heritage resources;

GOAL 4: Encourage heritage resource protection in communities throughout the state; and

GOAL 5: Secure the tools sufficient to preserve Maryland’s heritage resources.

The Preservation Plan states that “...by working to achieve these five goals, preservationists across the state will assist in the identification, evaluation, interpretation, and protection of Maryland’s historic,

archeological, and cultural resources for the benefit of future generations.”³ In addition, the concept of heritage resource preservation through tourism, economic development, and sustainability are major centerpieces of the state’s policies for resource protection.

Maryland Heritage Preservation and Tourism Program: In 2010, the Maryland Department of Planning (MDP), the Maryland Heritage Areas Authority (MHAA), and the Maryland and National Trusts for Historic Preservation produced [Maryland Heritage Areas Program: Charting a Sustainable Course for the Next Decade 2010 – 2020](#). This 10-Year Strategic Plan seeks to achieve sustainability by further defining heritage programmatic goals with recommended strategies, operating policies and procedures, timelines, and evaluation systems for Heritage Area implementation. This is the first substantive re-examination of the state’s Heritage Areas Program since its inception in 1996 with the *Canal Place Heritage Area*.

Improving Maryland Heritage Areas: Some important changes are planned for Maryland Heritage Areas and their operation and management, as indicated in the 2010 Strategic Plan. The Strategic Plan defines five core components for the development of specific strategies to improve Heritage Areas in Maryland. This includes: 1) Management; 2) Stewardship; 3) Heritage Tourism Marketing and Development; 4) Communication; and 5) Performance Evaluation.

Management: Heritage Areas will develop a five-year action plan and annual work plans based on a comprehensive review of management plans. Plans will be included with the submission of management grant applications to the MHAA. Strong financial solvency is stressed for Heritage Areas. This requires sound governance at the local level and effective oversight.

Stewardship: The state is seeking an increased focus on archeological and natural resource conservation including projects. The state suggests using the Green-Print Program, Program Open Space, and the Maryland Scenic Byways Program. Strategies for the Strategic Plan also include working with local partners on the development of plans such as comprehensive plans, Land Preservation and Parks and Recreation Plans (LPPRPs), trail plans, etc. The purpose is to strengthen resource conservation measures and partnerships with conservation groups at the local level.

Heritage Tourism Marketing and Product Development: The Strategic Plan advocates a strong partnership with the DMO or the DMO as the Heritage Area management entity. The purpose is to create consistent marketing messages for heritage tourism and link efforts to the Maryland Office of Tourism. Strategies also include the use of MHAA mini-grants for marketing and the development of a highly interactive Geographic Information System (GIS) Web site through the Maryland Office of Tourism that highlights state Heritage Areas and offerings.

³ *The Maryland Preservation Plan: Preservation Vision 2005*, Prepared by the Maryland Historic Trust, ISBN #1-878399-69-1, 2005, 2.

Communication: Communication includes the development of consistent communication statements by the MHAA, coordination with local Heritage Areas regarding such statements, and creation of a Web-based communication system with the MHAA. Efforts also include the development of a clearinghouse for heritage-related information, including resource guides, grants, programs, technical assistance, etc.

Performance Evaluation: The Strategic Plan recommends specific measures for performance evaluations including the MHAA and local Heritage Areas. This includes measuring Return on Investment (ROI).