

Maryland Heritage Areas Authority (MHAA)

2020 Program Metrics
Recommendations for

Certified Maryland
Heritage Areas

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assess. analyze.

2020 Program Metrics for Certified Maryland Heritage Areas

TABLE OF CONTENTS

<u>GOALS AND OBJECTIVES OF MHAA PROGRAM METRICS</u>	<u>2</u>
<u>MHAA AND CERTIFIED HERITAGE AREA PROGRAM METRICS</u>	<u>3</u>
PROGRAM METRICS TOOLS FOR SUCCESS	3
REPORTING AND ANALYSIS	3
SAMPLE PROGRAM METRICS REPORTS	3
<u>RECOMMENDED PROGRAM METRICS, METHODOLOGY, AND ASSUMPTIONS</u>	<u>4</u>
PART ONE: DATA COLLECTION	4
PART TWO: TESTIMONIALS, CASE STUDIES, AND QUOTES TO TELL THE STORY	14
PART THREE: PERCEPTIONS OF MHAA PROGRAM	15
<u>APPENDIX A: ANNUAL TRACKING WORK SHEET</u>	<u>16</u>
<u>APPENDIX B: HERITAGE AREA PROGRAM METRICS SURVEY</u>	<u>18</u>
<u>APPENDIX C: MHAA PROGRAM LEVEL SURVEY</u>	<u>23</u>
<u>APPENDIX D: VISITOR SURVEY AND POSTCARD</u>	<u>25</u>
<u>APPENDIX E: SAMPLE PROGRAM METRICS REPORTS</u>	<u>26</u>

Goals and Objectives of MHAA Program Metrics

The goal of the MHAA Program Metrics is to provide a framework to collect and present data about Maryland's Certified Heritage Areas (CHA). The recommended questions and data sources are based upon information gathered in the survey of heritage area directors, phone interviews with directors, and feedback during the Frederick, Maryland retreat in November 2019. To ensure that MHAA has the ability to implement repeatable data analysis, all questions will be asked of every heritage area, even if they may not apply to their specific activities and goals. Consistent reporting mechanisms will help put the information gathered to work for MHAA in its pursuit of statewide goals. It is not expected that data will be available from every heritage area for every section, as each heritage area is unique.

Parker Philips recommends that this work be conducted annually, based upon MHAA's fiscal year. The responsibility for collecting this data and information will be shared by MHAA (lead in compiling the data and the process), Heritage Areas (tracking data and responding to the survey on an annual basis), MHAA's grantees (completing grant report forms that include questions about metrics), and an external evaluator to collect and analyze the information. Parker Philips has prepared sample reports that will showcase the data collected as a result of the program metrics reporting. The goal is to showcase each heritage area's accomplishments, promote collaboration, and encourage cooperation. Given the current economic conditions and impacts to the tourism sector, the phrase "we are all in this together" applies more than ever.

The exercise of tracking program metrics should never be viewed as a competitive measure between CHAs or punitive tool, but rather a way to demonstrate value to CHA funders, partners, and the State. For example, concerns were raised about the reporting of fluctuating tourism numbers. One need only look to the COVID-19 pandemic gripping Maryland, the U.S., and the world, to understand that there are circumstances beyond control – no area director can control the fact that most sites, exhibits, parks, and trails are closed for use by visitors that spend money.

The questions are not intended to overconsume any heritage area director's time. Most directors are tracking these metrics as a part of existing operations. Parker Philips, with input from MHAA and individual heritage area directors, has endeavored to compile a strategy that minimizes the ask of all of those involved with administration and managing the heritage areas while still netting significant results. Participation by all CHAs is vital to the success of this project. The Maryland Certified Heritage Areas each have a great story to tell, and while initially it may feel like an extra task, the goal is to automate and ease the process – and it will net results. When stakeholders understand the full scope of MHAA and the CHA's role in Maryland's economic, cultural, and educational systems the message and mission the value of heritage area programming increases — and funders will follow.

PROGRAM METRICS STRUCTURE

Part One: Data Collection (The Numbers)

Part Two: Testimonials, Case Studies, and Quotes to Tell the Story (The Narrative)

Part Three: Perceptions of MHAA Program

MHAA and Certified Heritage Area Program Metrics

It is more important than ever to assert the value of the Maryland Certified Heritage Areas as a collective, as well as individual heritage areas. Parker Philips acknowledges that implementing this process is difficult. Please view this initial program metrics plan as a great way to showcase what each heritage area is already doing and a tool to collectively build new successes. Each heritage area should consider these program metrics as a baseline. If an individual heritage area wishes to expand their efforts in reporting their own program metrics that is strongly encouraged.

PROGRAM METRICS TOOLS FOR SUCCESS

Parker Philips recommends keeping the program metrics structure simple and low-tech to ensure participation and ease of reporting. Each CHA will be asked to complete an annual survey, MHAA will be asked to provide data from their grantee database and grantees' report forms, and key sites in each heritage area will be asked to report on their visitors. Parker Philips recommends that the the program metrics be collected by fiscal year. The data will be recorded and reported annually.

Each CHA will have the printed survey in advance coupled with a tracking work sheet. Each CHA will have the ability to complete the online form or submit a printed survey via email. Parker Philips acknowledges that there are many tools to track data and hours for programs. It is our recommendation that you walk before you run. When embarking on a new effort to track program metrics, there needs to be control over process and the individual metrics themselves. It is difficult to implement new web or program software at the same exact time that an organization is defining what it wants to track. Throwing too much at everyone at once results in confusion and lack of compliance. There is no one size fits all. Success in the first round of program metrics can lead to the identification of new tools and approaches. However, Parker Philips would not recommend during the first year of implementing this effort purchasing hours tracking tools or creating custom applications.

Everyone will have a role to play in collecting and reporting data. MHAA will need to add questions to its existing grantee reports and pull data as appropriate to populate the forms. CHA directors will need to track and report the information that they can gather on an annual basis. The data will be compiled and reported out.

REPORTING AND ANALYSIS

The data will need to be compiled to populate the final reports and produce the final data for presentation. Parker Philips recommends that MHAA hire an external evaluator for the analysis and compilation of the data. This will be completed annually based upon the fiscal year.

SAMPLE PROGRAM METRICS REPORTS

The data collected from this exercise will be used to populate market facing reports at the overall MHAA level and individual heritage level. (See Appendix D)

2020 Program Metrics for Certified Maryland Heritage Areas

Recommended Program Metrics, Methodology, and Assumptions

Part One: Data Collection

Survey questions are shaded light yellow. The survey instruments and tracking sheet are presented in Appendix A (ANNUAL TRACKING WORK SHEET), Appendix B (Heritage Area Program Survey), and Appendix C (MHAA Program Level Survey).

Data Collection About Maryland Heritage Areas			
Designated Maryland Heritage Areas	Methodology	Definition	Assumption
	Survey	Number of Heritage Areas Year Designated	MHAA Year Designated will be verified by Heritage Area directors.
Survey Question: Name of Heritage Area: _____ Year Designated as Maryland Heritage Area? _____ (year)			
National Heritage Area Designation	Survey	Year Designated	MHAA and Heritage Area(s) Pursuing National Heritage Area Designation It is not assumed that all heritage areas are national heritage areas or that a heritage area is located in a heritage area.
Survey Question: Is this specific Heritage Area also a designated National Heritage Area? Yes No If yes, year designation received? (Month/Year) _____ Is this Maryland Heritage Area co-located in the footprint of a National Heritage Area or Areas? Yes No If yes, please list the area(s): _____			
National Parks	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area It is not assumed that all heritage areas will have this in their footprint.

2020 Program Metrics for Certified Maryland Heritage Areas

Miles of Trails	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area	It is not assumed that all heritage areas will have this in their footprint.
State Parks	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area	It is not assumed that all heritage areas will have this in their footprint.
Miles of shoreline (lakes, rivers, oceans)	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area	It is not assumed that all heritage areas will have this in their footprint. This will be an estimate of shoreline, including rivers if quantifiable, within MHAA program.
Museums and Historic Sites	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area	It is not assumed that all heritage areas will have this in their footprint. This includes museums and historic sites (i.e., any place that provides interpretation of cultural resources but may not call itself a museum) in operation that are directly related to the heritage area's mission and themes.
Other _____	Verify and update data provided on survey	Designated space	MHAA, Consultant, and Heritage Area	The intent is to be broad, and when you have seen one heritage area, you have seen one. This is not a catalogue of every heritage area.

Survey Questions:

- Please verify the prepopulated list and describe the unique features of the heritage area. Please verify the data provided. If incorrect, please update the numbers and categories.
 - _____ miles of trails Is this correct? Yes No number/miles _____/_____
 - _____ miles of shoreline. Is this correct? Yes No number/miles
 - _____ number of Museums and Historic Sites Is this correct? Yes No number _____/_____
 - _____ number of State Parks Is this correct? Yes No number _____/_____
 - _____ number of National Parks Is this correct? Yes No number _____/_____
 - Other _____ Please describe: _____
 - Other _____ Please describe: _____

2020 Program Metrics for Certified Maryland Heritage Areas

Program Metric	Methodology	Definition	Responsibility	Assumption
<p>Visitors to Maryland Heritage Areas</p>	<p>Step 1: Heritage Areas will be asked to submit a core list of museums, events, natural resources that are directly related to the mission and vision of their Heritage Area. The list will include: Name of Place, Contact Person, Telephone Number, and email Address.</p> <p>Step Two: Online Survey Distribution We have designed an card as a leave behind for every heritage area that leads to an online survey about their visit. These can be left at the sites identified by the heritage areas. (Passive collection)</p> <p>Step 3: Request Visitor Counts from key sites identified by the</p>	<p>Core list of Heritage Area sites</p> <p>Visitor Surveys</p> <p>Estimates of Visitor Numbers and Admission Fees by Key Partners</p>	<p>MHAA</p> <p>Heritage Areas</p> <p>Outside Consultant</p>	<p>Step 1: This list should not include every event, museum, or natural resource in the Heritage Areas footprint. This should include only mission-related locations and events central to the heritage area's theme. Not all museums, events, and tourist attractions are directly related to a heritage area. Please be selective. The goal is not to have a large list rather it is to have an accurate reflection of events, places, and buildings that represent the theme of the heritage area. What are the core sites and events that support the heritage area's mission and theme?</p> <p>Step 2: Online Visitor Survey with Leave Behind Postcard We will ask that key partners within each heritage area make available a postcard that leads visitors to an online survey. Fifty postcards will be left at each site. It is not assumed that any surveys will be completed by any visitor at a site. It is not assumed that each Heritage Area will collect or distribute surveys. This will be a passive collection of data to test the effectiveness in each heritage area.</p> <p>Step 3: Collecting Visitor Numbers This is the single most challenging aspect of the data collection process. Data perfection is not possible in counting visitors at events or sites not charging admission. There are acknowledged limits to the veracity of this data. However, each heritage area's sites will face the same challenge. We acknowledge the limitations and move forward.</p> <p>Visitor Counts: We are looking for data on unique visitors by site. The source of this data can come from admissions fees, if charged (type of visitor – adult, child, senior citizen, student), sign-in books, downloads of audio tours, estimated attendance at events. Heritage area partners will need to provide their best estimates and the methodology used to gather this information. The goal of the first year of the study is to understand what they are counting and how they are counting it to discover the limits of the data being calculated.</p>

2020 Program Metrics for Certified Maryland Heritage Areas

	heritage area directors. MHAA staff sends out survey form with follow-up phone call asking for visitor numbers			The best starting place for the list is what does the heritage area highlight on the website as key attractions, museums, and events.
Survey Question: What sites are key partners in the heritage area? Heritage Area Directors will need to identify core museums, sites, and events that occur in their heritage area. These should be directly related to the heritage areas goals and mission.				
Events Sponsored or Co-Sponsored	Track and report sponsored events in a calendar year Track events by name, type of event, and estimated attendance.	If the heritage area has granted money or given in-kind support to an event in the heritage area and you are listed as a partner in the social media, flyer, promotional material	Heritage Area Directors Community Partners MHAA Grantee Survey	This does not include every event in a heritage area. These events are those that you provided either financial support or in-kind support. It is not assumed that every heritage area will have sponsored or co-sponsored events. In-kind Definition: Services, material, equipment or labor committed or received that would otherwise be paid from the project budget. In-kind contributions are goods (wholesale value) or services provided instead of cash for one or more project budget line-items. Examples include: <ul style="list-style-type: none"> • Professional services (legal, architectural, engineering, accounting, medical) at a customary hourly rate for the area. • Other services (printing, site preparation, fabricating, sub-contractors, publicity) at customary rate for time and materials. • Costs for use of machinery (heavy equipment) at customary hourly rate. • Volunteer time actually involved in project implementation. See the Independent Sector website to calculate the value.

2020 Program Metrics for Certified Maryland Heritage Areas

			<ul style="list-style-type: none"> Furnishings, food, landscape or construction materials (appliances, furniture, trees, plants, wood, plumbing, hardware etc.) donated by a business or an individual either directly or indirectly. Labor donated for fundraising activities does not count toward in-kind.
<p>Survey Questions:</p> <ul style="list-style-type: none"> Did the heritage area sponsor or co-sponsor any events in the past year? Yes No <ul style="list-style-type: none"> If Yes, how many events were sponsored or co-sponsored in the heritage area this year? _____ If Yes, what events? (please list and briefly describe) _____ If Yes, what was the estimated attendance at these events? _____ What was the cost of admission at the events? _____ If known, what was the methodology to collect data about attendance at the events? _____ What was the heritage area's contribution to the event? (select all that apply) <ul style="list-style-type: none"> Financial (amount \$ _____) In-kind (estimated hours _____) and (estimated dollar amount \$ _____) and estimated hours _____ Other (please describe amount \$ and estimated hours) \$ _____ and estimated hours _____ 			
<p>Building(s) Conserved/Rehabbed and Acres of Land Conserved</p>	<p>Track and report buildings and land conserved in a calendar year</p>	<p>If the heritage area had conserved land and buildings please complete this section.</p> <p>MHAA will also ask grantees this information on their grant applications and reports.</p>	<p>Heritage Area Directors</p> <p>MHAA Grant Survey</p> <p>MHAA Grantee Reports</p> <p>It is not assumed that all heritage areas will have any data to report.</p> <p>The goal is to identify how many buildings have been rehabbed/conserved and/or how many acres of land have been conserved the help of the heritage area or through MHAA grant funding.</p>
<p>Survey Question:</p> <ul style="list-style-type: none"> In the past year, did the heritage area conserve/rehab any buildings or acres of land using grant funds or tax credits? Yes No If Land, how many acres? _____ If Building(s), how many? _____ Please describe the project and its historical significance to the heritage area. _____ Please describe the project and its historical significance to the heritage area. _____ 			

2020 Program Metrics for Certified Maryland Heritage Areas

<p>New and enhanced experiences and exhibits</p>	<p>Track and report new and enhanced experiences and exhibits</p>	<p>Provide information about all new and enhanced experiences and exhibits developed by the heritage area. MHAA will also ask grantees this information on their grant applications and reports?</p>	<p>Heritage Area Directors MHAA Grant Survey MHAA Grantee Reports</p>	<p>It is not assumed that all heritage areas will have any data to report. This includes new and enhanced exhibits by the specific heritage area. MHAA grant survey will identify others for the program metrics year. An enhanced experience may also include adding miles of trails, adding a boat launch, and other improvements to natural resources.</p>
<p>New strategies or interpretive products to promote equity and inclusion</p>	<p>Track and report new strategies or interpretive products to promote equity and inclusion</p>	<p>Provide information about all new strategies or interpretive products developed by the heritage area</p>	<p>Heritage Area Directors MHAA Grant Survey</p>	<p>Definitions: Equity seeks to ensure fair treatment, equality of opportunity, and fairness in access to information and resources for all. We believe this is only possible in an environment built on respect and dignity. Inclusion builds a culture of belonging by actively inviting the contribution and participation of all people.</p>
<p>Survey Questions:</p> <ul style="list-style-type: none"> • Did the heritage area or an organization in this heritage area develop any new experiences or exhibits? Yes No • If Yes, please describe the new experience or exhibit developed. • Did the heritage area or an organization in this heritage area enhance any existing experiences or exhibits? Yes No • If Yes, please describe the enhanced experience or exhibit developed. • Has the heritage area developed any new strategies or interpretive products to promote equity and inclusion? Yes No • If Yes, please describe the strategy or interpretive product and the audience. 				

2020 Program Metrics for Certified Maryland Heritage Areas

Program Metric	Methodology	Definition	Responsibility	Assumptions
Hours of technical assistance provided	Each Heritage Area will track hours of technical assistance on a log sheet on a monthly basis for initiatives in their heritage area. ANNUAL ONLINE TRACKING WORK SHEET	Track hours on a monthly basis on the log sheet.	Heritage Area Directors MHAA Compiles Data for Reporting	It is not assumed that all heritage areas will have any data to report. Technical assistance is defined as non-financial help provided by the heritage area to other organizations, groups, people. It can take the form of sharing information and expertise, instruction, skills training, transmission of working knowledge, and consulting services and may also involve the transfer of technical data. The intent of tracking these hours is not to track every minute on the clock – it is to capture time spent on initiatives that are a part of larger efforts in the heritage area. It is not every phone call, email, or conversation. The goal is to track efforts that align with the heritage area’s broader plan. It is assumed that these hours will include telephone calls, ZOOM/GoToMeeting sessions, in-person meetings, and emails.
Survey Question: Please estimate the number of hours you spent providing technical assistance to other nonprofits in the heritage area using the ANNUAL TRACKING WORK SHEET				
<ul style="list-style-type: none"> • Did the heritage area provide technical assistance on major initiatives in the heritage area over the past year? Yes No <ul style="list-style-type: none"> <input type="radio"/> If Yes, how many hours? (please estimate) _____ <input type="radio"/> If known, what is the dollar value associated with this technical assistance? _____ 				
Strategic partnerships and collaborations sustained and formed	Each Heritage Area will conduct a baseline inventory of strategic partnerships they participated in the past year. ANNUAL ONLINE TRACKING WORK SHEET	Record numbers of strategic partners that the heritage area has worked with in the past year.	Heritage Area Directors MHAA Compiles Data for Reporting	This number is not expected to increase annually. Its intent is to show the breadth of each heritage areas work and collaboration. Definition of strategic partnerships and collaboration: strategic alliances between organizations that are intended to achieve greater impact than any organization could generate on its own. These alliances exist along a broad spectrum of approaches, ranging from less integrated associations and coalitions to more highly integrated joint programming, shared services, and legal mergers. A strategic partnership is an agreed-upon collaboration between organizations with common missions. Although partnerships can take on a number of objectives and levels of

2020 Program Metrics for Certified Maryland Heritage Areas

					formality depending upon the nature of the agreement, the overall goal of strategic partnerships is to share resources in a way that promotes growth for all partners.
<p>Survey Questions:</p> <ul style="list-style-type: none"> • How many strategic partnerships/collaborations did the heritage area sustain in the past year? _____ • How may new strategic partnerships/collaborations did the heritage area form in the past year? _____ 					
<p>Workshops, conferences, and trainings hosted</p>	<p>Each Heritage Area will track how many workshops and trainings they sponsored or hosted annually (virtual)</p> <p>ANNUAL ONLINE TRACKING WORK SHEET</p>	<p>Track workshops and trainings hosted by the heritage area</p>	<p>Heritage Area Tracks and Reports</p> <p>MHAA Compiles Data for Reporting</p>	<p>This number is not expected to increase annually. Its intent is to show the breadth of each heritage areas work and collaboration.</p> <p>These need to be events that are sponsored name of the heritage area or that content has been provided by the heritage area.</p> <p>It is not assumed that Heritage Areas will host workshops, conferences, and trainings.</p>	
<p>Survey Questions:</p> <ul style="list-style-type: none"> • How many workshops or training sessions did the heritage area host last year (either in-person or virtually)? _____ ○ How many people attended? _____ • How many conferences did the heritage area host last year (either in-person or virtually)? _____ ○ How many people attended? _____ • How many workshops or training sessions did the heritage area sponsor last year (either in-person or virtually)? _____ ○ How many people attended? _____ 					
<p>Referrals Made to Subject Matter Experts and Other Organizations</p>	<p>Each heritage area will track the number of times they make referrals/connections with subject matter experts and other organizations in their heritage area.</p>	<p>Track connections made by experts made in the heritage area.</p>	<p>Heritage Area Tracks and Reports</p> <p>MHAA Compiles Data for Reporting</p>	<p>It is not assumed that heritage areas made subject matter expert referrals.</p> <p>Referral is defined as an act of referring a person or an organization or something for consultation, review, or further action. It is not assumed that the heritage area director will follow-up on the outcomes of the referral.</p>	

2020 Program Metrics for Certified Maryland Heritage Areas

	ANNUAL ONLINE TRACKING WORK SHEET		
Survey Questions: <ul style="list-style-type: none"> • Did the heritage area make referrals of subject matter experts to other organizations? Yes No <ul style="list-style-type: none"> ○ If Yes, how many connections were made between subject matter experts and local businesses and other organizations? _____ ○ If Yes, why were these connections significant to the advancement of the heritage area's goals? (Please be specific) _____ 			

Program Metric	Methodology	Definition	Responsibility	Assumption
Management and Marketing Grants Awarded by MHAA to CHA management entities	MHAA Grants Database	Management and marketing grants awarded by MHAA	MHAA	MHAA will provide this data on an annual basis.
Project Grants Awarded by MHAA to partner organizations	MHAA Grants Database	Project grants awarded by MHAA	MHAA	MHAA will provide this data on an annual basis.
Dollars Leveraged by MHAA-Awarded Grants	MHAA Grants Database	Dollars leveraged by grantees	MHAA	MHAA will provide this data on an annual basis.
Grants Awarded by Heritage Areas (Originating in funding from MHAA Block or Management Grants)	MHAA Annual Grant Survey Heritage Area Survey	Dollars awarded annually	MHAA Heritage Areas	It is not assumed that all heritage areas will have this data.
Dollars Leveraged by MHAA-funded grants awarded by Heritage Areas	Heritage Area Survey	Dollars leveraged by MHAA-funded grants	Heritage Areas	It is not assumed that all heritage areas will have this data.
Non-MHAA Dollars Awarded to other organizations by the Heritage Area	Heritage Area Survey	Dollars awarded annually These funds are non-state funds federal or local beyond any required MHAA match.	Heritage Areas	It is not assumed that all heritage areas will have this data. These funds can be federal or local beyond any required match.

2020 Program Metrics for Certified Maryland Heritage Areas

Program Metric	Methodology	Financial Investment and Leverage Definition	Responsibility	Assumption
Survey Questions				
• Management and Marketing Grants Awarded by MHAA to CHA management entities				
• Project Grants Awarded by MHAA to partner organizations				
• Dollars Leveraged by MHAA-Awarded Grants				
• Grants Awarded by Heritage Areas (Originating in funding from MHAA Block or Management Grants)				
• Dollars Leveraged by MHAA-funded grants awarded by Heritage Areas				
• Non-MHAA Dollars Awarded to other organizations by the Heritage Area				

2020 Program Metrics for Certified Maryland Heritage Areas

Part Two: Testimonials, Case Studies, and Quotes to Tell The Story

The goal of this exercise is to add the voice of CHA stakeholders to the program metrics report. Each heritage area will be asked to provide the names of two contacts to be interviewed by a third-party evaluator to build the narrative of the program metrics report. The goal is to tell the story of each CHA through the voices of key internal and external stakeholders who understand the value and importance of the heritage area.

- What was the signature accomplishment achieved or marquee moment experienced in the heritage area as related to the heritage area’s management plan and/or program goals during the past year? Please describe in detail.
- How has the mission of the heritage area been advanced in the past year?

Please provide the names of two people that could provide information about the heritage area’s activities or performance in the past year. These people can include board members, strategic partners, legislators, historians, conservationists, etc. It is recommended that one interview be a board member or staff person from the heritage area management entity organization and one external person to help craft a unique narrative. Oftentimes the best testimonial comes from someone that is outside of the formal structure of the heritage area. Each person will be contacted and to obtain a quote that will be used as a part of the annual program metrics data gathering and reporting exercise.

	Interviewee 1	Interviewee 2
Name		
Organization		
Title		
Email		
Telephone		
<p>Methodology and Survey Heritage Area directors provide one or two contacts to be interviewed about their program. Each interview will last between 15 to 30 minutes. Evaluator arranges for interviews to get the following questions answered:</p> <ul style="list-style-type: none"> • What is your role and relationship to the heritage area? • How has this heritage area impacted the region? What are the major accomplishments and achievements? Please be specific. • Why is the heritage area designation important to the region? Please be specific. • What is the one thing that people need to understand about this heritage area? • Is there anything that we haven’t discussed that you think is important for us to understand about the heritage area? Please be specific. 		

2020 Program Metrics for Certified Maryland Heritage Areas

Part Three: Perceptions of MHAA Program

The third part of the program metrics will ask for specific feedback and perceptions about the MHAA program.

- Is there any aspect of the Maryland Heritage Areas Program that has created a challenge for this specific heritage area, or that you recommend as a necessary change? **Yes No** Please explain.
- Please describe the factors, both positive and negative that impacted the heritage area this year.
 - **Positive Factors** that have contributed to the success of the heritage area this year. Please describe.
 - **Negative Factors** that have detracted from or interfered with the success of the heritage area this year. Please describe.
- Is there anything else you would like us to know about experience as a Maryland Certified Heritage Area?

APPENDIX A
ANNUAL ONLINE
TRACKING WORKSHEET



2020 Program Metrics for Certified Maryland Heritage Areas

Strategic Partnerships Sustained and Formed		
<ul style="list-style-type: none"> How many strategic partnerships/collaborations did the heritage area sustain in the past year? How many new strategic partnerships/collaborations did the heritage area form in the past year? 		
Month	Partnerships/Collaborations Sustained	New Partnerships Collaborations
Workshops, Conferences, and Trainings Hosted		
<ul style="list-style-type: none"> How many workshops, conferences, and training sessions did the heritage area host last year? How many people attended? 		
Month	Workshop, Conference, Training Hosted	Attendance
Connections Made with Subject Matter Experts and Other Organizations		
<p>Did the heritage area facilitate any connections between subject matter experts and other organizations in the heritage area?</p> <p>If Yes, how many connections did the heritage area make between subject matter experts and/or local businesses/other organizations?</p>		
Month	Number of Connections Made with Subject Matter Experts and/or Other Organizations	Significance

APPENDIX B
HERITAGE AREA
PROGRAM METRICS SURVEY



2020 Program Metrics for Certified Maryland Heritage Areas

Appendix B: Heritage Area Program Metrics Survey

(Provided in Microsoft Word and online)

The following questions were developed to gain an understanding of the impact of the Maryland Certified Heritage Areas on the State of Maryland. Any negative information you provide will in no way impact the CHA's eligibility for funding in the future. Please try to answer every question.

We appreciate your time. The answer to these questions will make the MHAA program stronger.

Heritage Area Profile

1. Name of Heritage Area: _____
2. Year Designated as Maryland Heritage Area? _____(year)
3. Is this specific Heritage Area also a designated National Heritage Area? Yes No
 3a. If yes, year designation received? (Month/Year) _____
4. Is this Maryland Heritage Area co-located in the footprint of a National Heritage Area or Areas? Yes No
 4a. If yes, please list the area(s): _____
5. We want to showcase the diversity of Maryland's Heritage Areas. *Please verify and describe the unique features of this heritage area. Please verify the data provided in the the prepopulated list. If incorrect, please update the numbers and categories.*

_____ miles of trails	Is this correct? Yes No number/miles_____/_____)
_____ miles of shoreline	Is this correct? Yes No number/miles_____/_____)
_____ number of museums & historic sites	Is this correct? Yes No number_____/_____)
_____ number of State Parks	Is this correct? Yes No number_____/_____)
_____ number of National Parks	Is this correct? Yes No number_____/_____)
_____ Other _____	Please describe: _____
_____ Other _____	Please describe: _____

Visitors to Heritage Areas

6. **What sites are key partners in the heritage area?** Please identify core museums, sites, and events that occur in the heritage area. These should be directly related to the heritage area's goals and mission.

Name of Site/ Event	Name of Key Contact Person	Email/Telephone

2020 Program Metrics for Certified Maryland Heritage Areas

Name of Site/ Event	Name of Key Contact Person	Email/Telephone

Sponsored or Co-Sponsored Events

7. Did the heritage area sponsor or co-sponsor any events in the past year? **Yes** **No**

7a. If Yes, how many events were sponsored or co-sponsored in the heritage area this year? _____

7b. If Yes, what events? (please list and briefly describe) _____

7c. If Yes, what was the estimated attendance at these events? _____

7d. What was the cost of admission at the events? _____

7e. If known, what was the methodology to collect data about attendance at the events?

8. What was the heritage area's contribution to the event? (select all that apply)

8a. Financial (amount \$ _____)

8b. In-kind (estimated hours _____) and (estimated dollar amount \$ _____)

8c. Other (please describe amount \$ _____ and estimated hours _____)

Building(s) Conserved/Rehabbed and Acres of Land Conserved

9. In the past year, did the heritage area conserve/rehab any buildings or acres of land using grant funds or tax credits? **Yes** **No**

9a. If **Land**, how many acres? _____ and please describe the project and its historical significance to the heritage area. _____

9b. If **Building(s)**, how many? _____ and please describe the project and its historical significance to the heritage area. _____

New and Enhanced Experiences and Exhibits

10. Did the heritage area or an organization in this heritage area develop any new experiences or exhibits? **Yes** **No**

10a. If **Yes**, please describe the new experience or exhibit developed _____.

2020 Program Metrics for Certified Maryland Heritage Areas

11. Did the heritage area or an organization in this heritage area enhance any existing experiences or exhibits? Yes No

11a. If Yes, please describe the enhanced experience or exhibit developed _____.

New Strategies or Interpretive Products to Promote Equity and Inclusion

12. Has the heritage area developed any new strategies or interpretive products to promote equity and inclusion? Yes No

12a. If Yes, please describe the strategy or interpretive product and the audience _____.

Hours of Technical Assistance Provided

Please estimate the number of hours you spent providing technical assistance to other nonprofits in the heritage area using the ANNUAL TRACKING WORK SHEET that you have been using this year.

13. Did the heritage area provide technical assistance on major initiatives in the heritage area over the past year? Yes No

13a. If Yes, how many hours? (please estimate) _____

13b. If known, what is the dollar value associated with this technical assistance?
\$ amount _____

Strategic Partnerships and Collaborations Sustained and Formed

14. How many strategic partnerships/collaborations did the heritage area sustain in the past year?

15. How many *new* strategic partnerships/collaborations did the heritage area form in the past year? _____

Workshops, Conferences, and Trainings Hosted

16. How many workshops or training sessions did the heritage area host last year (either in-person or virtually)? _____

17. How many conferences did the heritage area host last year (either in-person or virtually)? _____
17a. How many people attended? _____

18. How many workshops or training sessions did the heritage area sponsor last year year (either in-person or virtually)? _____

18a. How many people attended? _____

18b. How many people attended? _____

2020 Program Metrics for Certified Maryland Heritage Areas

Referrals Made to Subject Matter Experts and Other Organizations

19. Did the heritage area make referrals of subject matter experts to other organizations?
 Yes No
- 19a. If Yes, how many connections were made between subject matter experts and local businesses and other organizations? _____
- 19b. If Yes, why were these connections significant to the advancement of the heritage area's goals? (Please be specific) _____

Financial Investment and Leverage

20. How many grants did you award last year? _____
 20a. What was their dollar amount? _____
21. Did your heritage area award any other grants or funds beyond any required match? **Yes No**
 21a. How many grants? _____
 21b. What was their dollar amount? _____

Testimonials, Case Studies, and Quotes to Tell Your Story

Could you please provide one or two contacts that we could reach out to, to talk about the importance of the program?

	Interviewee 1	Interviewee 2
Name		
Organization		
Title		
Email		
Telephone		

About the Heritage Area and the MHAA Program

22. What was the signature accomplishment, in the past year, in the heritage area? In other words, what are you most proud of?

Please describe in detail.

2020 Program Metrics for Certified Maryland Heritage Areas

23. How has the mission of the heritage area been advanced in the past year?

Please describe in detail.

Perceptions of MHAA Program

24. Is there any aspect of the Maryland Heritage Areas Program that has caused a problem for your specific heritage area or that you feel needs to be changed? Yes No

Please explain.

25. Please describe the factors, both positive and negative that impacted the heritage area this year.

25a. **Positive Factors** that have contributed to the success of the heritage area this year.

Please describe.

25b. **Negative Factors** that have detracted from or interfered with the success of the heritage area this year.

Please describe:

26. Is there anything else you would like us to know about your experience as a Maryland Certified Heritage Area?

APPENDIX C
MHAA PROGRAM
LEVEL SURVEY



Appendix C: MHAA Program Level Survey

(Provided in Microsoft Word and online)

MHAA will provide data and information to complete the program metrics project. This section will include data and information gathered from the grants database compiled by MHAA. The data reported refers to the most recent fiscal year completed. Please report on completed projects in the current fiscal year.

1. Name of Heritage Area that data describes (drop down)

Survey Questions:

2. Did the heritage area or a grantee organization in this heritage area develop any new experiences or exhibits? Yes No
 - 2a. If Yes, please describe the new experience(s) or exhibit(s) developed. _____
3. Did the heritage area or a grantee organization in this heritage area enhance any existing experiences or exhibits? Yes No
 - 3a. If Yes, please describe the enhanced experience(s) or exhibit(s) developed.

4. Has the heritage area or grantee organization develop any new strategies or interpretive products to promote equity and inclusion? Yes No
 - 4a. If Yes, please describe the strategy or interpretive product and the audience _____.

Events Sponsored or Co-Sponsored

5. Did the heritage area or a grantee organization sponsor or co-sponsor any events in the past year? Yes No
 - 5a. If Yes, how many events this year? _____
 - 5b. If Yes, what events? (please list and briefly describe) _____
 - 5c. If Yes, what was the estimated attendance at these events? _____
 - 5d. What was the cost of admission at this event, if applicable? _____
 - 5e. If known, what was the methodology to collect attendance data about the events? _____

Building(s) Conserved and Acres of Land Conserved

6. In the past year, did this heritage area or a grantee organization conserve any acres of land? Yes No
 - 6a. If Yes, how many acres? _____
 - 6b. If Yes, please describe the project and its historical significance to the heritage area.

2020 Program Metrics for Certified Maryland Heritage Areas

7. In the past year, did the heritage area or a grantee organization conserve or rehabilitate any **buildings**? Yes No
 7a. If Yes, how many? _____
 7b. If Yes, Please describe the project and its historical significance to the heritage area. _____
8. Please provide information about dollars invested by the State of Maryland and grantees broken out by heritage area and totaled for the entire state.

	Amount	Total
a. Management and Marketing Grants Awarded by MHAA to CHA management entitites		
b. Project Grants Awarded by MHAA to partner organizations		
c. Dollars Leveraged by MHAA-Awarded Grants		
d. Grants Awarded by Heritage Areas (Originating in funding from MHAA Block or Management Grants)		
e. Dollars Leveraged by MHAA-funded grants awarded by Heritage Areas		
f. Non-MHAA Dollars Awarded to other organizations by the Heritage Area		

APPENDIX D
VISITOR SURVEY
AND POSTCARD



We Need 10 Minutes
of Your Time!



Date: _____
Location: _____
Heritage Area: _____

* Please designate only one adult traveler from your group to complete the survey.

We would like to ask you some questions about WHERE YOU CAME FROM TO GET HERE TODAY.

What is your home zip code? _____

What county and state do you live in? _____ County _____ State

If outside the U.S., what country are you visiting from?

Did you travel more than 50 miles to get here today? Yes ___ No ___

What is the main purpose of your visit to the Maryland Heritage Area today?

___ Business

___ Leisure (please tell us the main reason you are visiting today)

___ Both

Did you visit alone or with others?

___ Alone

___ With adults. How many? ___

___ With youth 14 to 17 years old. How many? ___

___ With youth 11 to 13 years old. How many? ___

___ With youth 7 to 10 years old. How many? ___

___ With youth under 7 years old. How many? ___

How long did you/will you be visiting here? (either this event or the area)

Number of Hours? _____ Days? _____ Nights? _____

How did you travel here today? [Check ALL that apply]

___ Car/Truck/Motorcycle ___ Taxi

___ Bus ___ Bike

___ Airplane ___ Scooter Other: _____

What sites will you be visiting or activities will you be doing on this trip or at this event? (Please list specific activities or sites visited)

1. _____
2. _____
3. _____

How much do you estimate your party will spend on this trip? \$ _____

Now, let's break down your spending. During this visit, how much will/did you spend per day on the following categories?

Please include spending by all members in your party. (Provide your best estimate. If you are at a local event, we don't expect you to have all of these expenses.)

\$ _____ Airfare

\$ _____ Rental Car

\$ _____ Lodging (e.g., hotel, motel, vacation home rental/Air BnB, etc.)
What is the name of the hotel/motel/rental where you stayed?

Where is it located? (city, cross street and/or ZIP code)

\$ _____ Lodging at a campground or cabin
What is the name of the campground/cabins where you stayed?

Where is it located? (city, cross street and/or ZIP code)

\$ _____ Lodging at a friend's or family member's house or apartment

\$ _____ Local Transportation
(e.g., tolls, bus, taxi, Uber/Lyft, trolley, bike, scooter, or boat rentals)

\$ _____ Gasoline

\$ _____ Retail shopping
(merchandise, souvenirs, novelty items, etc.)

\$ _____ Groceries and convenience stores
(e.g., food, snacks, and drink)

\$ _____ Food and drink at fast food restaurants
(e.g., McDonalds, Burger King, etc.)

\$ _____ Food and drink at fast casual restaurants
(e.g., Panera, Chipotle, Noodles & Company)

\$ _____ Food and drink at full-service restaurants

\$ _____ Local entertainment
(e.g., site ticket cost, museums, event entrance fees, festival fees, movies, theaters, etc.)

\$ _____ Other: please specify and explain



MARYLAND NEEDS TO HEAR ABOUT YOUR EXPERIENCE

(and 10 minutes of your time)

The Maryland Heritage Areas Authority has hired Parker Philips, Inc. to study how folks, like you, spend money when they are visiting museums, attending festivals, enjoying parks and trails, and learning about the history and culture. This survey will help our team understand the unique value of heritage tourism throughout Maryland.

The survey includes quick and simple questions like:

- where do you live? • where did you visit?
- where did you stay? • what did you buy?

Please go to the following link to participate in the survey:

<https://www.surveymonkey.com/r/MDHeritage>

Pssst.....if you complete the survey, you will be entered to win a \$100 Visa Gift Card.

QUESTIONS? Call Parker Philips at 888-340-8432, ext. 1. All responses will remain anonymous.





MARYLAND NECESITA OÍR SOBRE SU EXPERIENCIA

(y 10 minutos de su tiempo)

La Maryland Heritage Areas Authority (Autoridad de Áreas de Patrimonio Cultural de Maryland) ha contratado a Parker Phillips, Inc. para estudiar la manera en que personas como usted gastan dinero cuando visitan museos, van a festivales, disfrutan de los parques y senderos, y aprenden sobre historia y cultura. Esta encuesta ayudará a nuestro equipo a entender el valor único del turismo de patrimonio cultural a lo largo y ancho de Maryland

La encuesta incluye preguntas rápidas y simples como:

- ¿dónde vive? • ¿qué lugares visitó?
- ¿dónde se quedó? • ¿qué compró?

Por favor, siga el link a continuación para participar de la encuesta:

<https://www.surveymonkey.com/r/MDHeritage2>

Pssst....si completa la encuesta, estará participando para ganar una Tarjeta de Regalo Visa de \$100.

¿TIENE PREGUNTAS? Llame a Parker Phillips al 888-340-8432, ext. 1. Todas las respuestas permanecerán anónimas.



APPENDIX E
SAMPLE PROGRAM
METRICS REPORTS



MARYLAND HERITAGE AREAS



2021 Evaluation Summary

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ABOUT MARYLAND HERITAGE AREAS

1

- 13 Designated Maryland Heritage Areas
- 1 National Heritage Area Designation
- XX Greenways
- XX National Parks
- XX miles of Trails
- XX miles of shoreline
- XX museums



TOURISM AND PRESERVATION

2

- XXXXX Visitors to Maryland Heritage Areas
- XXX Events Sponsored or Co-Sponsored
- XX Buildings Conserved and Land Conserved
- XX New and enhanced experiences and exhibits



OUTREACH AND TECHNICAL ASSISTANCE

3

- XX hours of technical assistance provided
- XX Strategic partnerships sustained and formed
- XX Workshops and trainings hosted
- XX Connections Made with Subject Matter Experts



FINANCIAL INVESTMENT AND LEVERAGE

4

- \$XX.X Invested by the State of Maryland



SIGNATURE HERITAGE AREA ACCOMPLISHMENTS

BALTIMORE NATIONAL



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HEART OF CHESAPEAKE COUNTRY



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LOWER EASTERN SHORE



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MARYLAND MILESTONES



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MOUNTAIN MARYLAND



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PATAPSCO VALLEY



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STORIES OF THE CHESAPEAKE



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FOUR RIVERS



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MONTGOMERY COUNTY



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DESTINATION SOUTHERN MARYLAND



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DESTINATION SOUTHERN MARYLAND

BY THE NUMBERS

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ABOUT DESTINATION SOUTHERN MARYLAND

1

1 of 13 Designated Maryland Heritage Areas

XX Greenways

XX National Parks

XX miles of Trails

XX miles of shoreline

XX museums



TOURISM AND PRESERVATION

2

XXXXX Visitors to Maryland Heritage Areas

XXX Events Sponsored or Co-Sponsored

XX Buildings Conserved and Land Conserved

XX New and enhanced experiences and exhibits



OUTREACH AND TECHNICAL ASSISTANCE

3

XX hours of technical assistance provided

XX Strategic partnerships sustained and formed

XX Workshops and trainings hosted

XX Connections Made with Subject Matter Experts



FINANCIAL INVESTMENT AND LEVERAGE

4

\$XX.X Invested by the State of Maryland



APPENDIX E
SAMPLE PROGRAM
METRICS REPORTS



APPENDIX E
SAMPLE PROGRAM
METRICS REPORTS

