

TEXAS HISTORICAL COMMISSION

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**AGENDA**  
**COMMUNITY HERITAGE DEVELOPMENT COMMITTEE**

June 16, 2020

2:00 p.m.

(or upon the adjournment of the 1:30 p.m. Archeology committee, whichever occurs later)

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*Pursuant to the Governor's March 13, 2020 proclamation of a state of disaster declaration due to the Coronavirus (COVID-19) and March 16, 2020 suspension of certain provisions of the Texas Open Meetings Act, the June 16, 2020 meeting of the THC Community Heritage Development Committee will be held by video conference meeting, as authorized under Texas Government Code section 551.127. Members of the public will have access to the toll-free videoconference at <https://attendee.gotowebinar.com/register/7945595896575660303> (web ID 653-577-475) or by calling via telephone 1-562-247-8321 (code 305-277-040#) for audio-only access. A copy of the agenda and meeting materials are available at [www.thc.texas.gov/teleconferences](http://www.thc.texas.gov/teleconferences). An audio recording of the meeting will be available after June 17, 2020. To obtain a recording, please contact Virginia Owens at 512-463-6006. The members may discuss and/or take action on any of the items listed in the agenda.*

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1. Call to Order —*Committee Chairman Peterson*
  - A. Roll call for committee members
  - B. Roll call for other participants
  - C. Establish quorum
  - D. Recognize and/or excuse absences
2. Consider approval of the May 8, 2020 committee meeting minutes —*Committee Chairman Peterson*
3. Consider adoption of amendments to TAC, Title 13, Part 2, Chapter 19, section 19.3 related to the Texas Main Street Program, without changes to the text as published in the March 6, 2020 issue of the *Texas Register*, 45TexReg 1525-1527 (item 6.5E) —*Committee Chairman Peterson*
4. Consider Amendment of January 2020 CLG Grant Awards and Reallocation of Available FY 2019 Grant Funds (item 11.2) —*Committee Chairman Peterson*
5. Consider adoption of the Strategic Plan for the Texas Heritage Tourism Program and Texas Heritage Trails Program (item 11.5) —*Committee Chairman Peterson*
6. Community Heritage Development Division update and committee discussion —*Patterson*
  - A. Update on Real Places conferences
  - B. Update on the Texas Main Street Program activities including staffing, DowntownTX.org, and relationship with Texas Downtown Association
  - C. Update on heritage tourism activities including Texas Heritage Trails Program
  - D. Update on the Certified Local Government activities including grants, training, and prospective CLGs
7. Adjournment

*NOTICE OF ASSISTANCE AT PUBLIC MEETINGS: Persons with disabilities who plan to attend this meeting and who may need auxiliary aids or services such as interpreters for persons who are deaf or hearing impaired, readers, large print or Braille, are requested to contact Esther Garza at (512) 463-5768 at least four (4) business days prior to the meeting so that appropriate arrangements can be made.*

TEXAS HISTORICAL COMMISSION

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**MINUTES**  
**COMMUNITY HERITAGE DEVELOPMENT COMMITTEE**  
Teleconference Meeting  
May 8, 2020  
1:00 p.m.

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*Note: For the full text of action items, please contact the Texas Historical Commission at P.O. Box 12276, Austin, TX 78711 or call 512.463.6100.*

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**1. Call to Order**

The meeting of the Texas Historical Commission (THC) Community Heritage Development Committee was called to order by Committee Chairman Pete Peterson at 1:04 p.m. He announced that “pursuant to the Governor’s March 13, 2020 proclamation of a state of disaster declaration due to the Coronavirus (COVID-19) and March 16, 2020 suspension of certain provisions of the Texas Open Meetings Act, the May 8, 2020 meeting of the THC Community Heritage Development Committee will be held by video conference meeting, as authorized under Texas Government Code section 551.127. Members of the public will have access to the videoconference at <https://attendee.gotowebinar.com/register/2118105103859804942> toll-free. A copy of the agenda and meeting materials are available at [www.thc.texas.gov/teleconferences](http://www.thc.texas.gov/teleconferences). An audio recording of the meeting will be available after May 11, 2020. To obtain a recording, please contact Virginia Owens at 512-463-6006. The members may discuss and/or take action on any of the items listed in the agenda.”

**A. Roll call for committee members**

Chairman Peterson welcomed everyone. Members in attendance in addition to the Chair, included Commissioners Renee Dutia, Daisy White, Garrett Donnelly, Wallace Jefferson, and Lilia Garcia.

**B. Roll call for other participants**

Other participants on the call included Mark Wolfe, Director, Alvin Miller, Deputy Director of the Texas Historical Commission, and Brad Patterson, Division Director.

**C. Establish Quorum**

Chairman Peterson reported a quorum was present.

**D. Recognize and/or excuse absences**

Chairman Peterson noted that commissioner Monica Burdette was not in attendance. Commissioner White moved that Commissioner Burdette be excused, seconded by Commissioner Donnelly. Motion passed unanimously.

**2. Consider approval of the January 28, 2020 committee meeting minutes —*Committee Chairman Peterson***

Commissioner White moved, Commissioner Jefferson seconded, and the commission voted unanimously to approve the January 28, 2020 Community Heritage Development (CHD) committee meeting minutes.

**3. Consider amendment of the biennial funding plan for the Texas Heritage Trails Program. —  
Committee Chairman Peterson**

Mr. Patterson explained that the 86th Texas Legislature appropriated \$1,000,000 each year of the FY 2020-21 biennium to support the Texas Heritage Trails Program (THTP). The Commission approved a biennial

funding plan for the program in July of 2019. Given the current situation with Covid-19 and potential economic uncertainty, staff is recommending amending the plan to give maximum flexibility to the regions. No changes need to be made to the current fiscal year as the regions have received most of the money and their work is ongoing. Under the new proposal each region would continue to receive \$81,500 in state funds, unchanged from what they received this fiscal year. It is proposed is that the base amount provided to each region for their services be increased from \$50,000 to \$70,000 while the amount requiring a direct match be reduced from \$31,500 to \$11,500, keeping the total funding level unchanged. Under the original funding plan the ratio of cash match to state funds was scheduled to increase but staff is instead recommending keeping that ratio steady for the next fiscal year. Payments would be disbursed over four equal payments instead of front-loaded early in the year.

Commission White moved to recommend to the full commission, the amended biennial funding plan for the Texas Heritage Trails Program for fiscal years 2020 and 2021. Seconded by Commissioner Jefferson. Motion passed unanimously.

**4. Consider extension of the Texas Main Street Program application deadline until August 31, 2020 for program entry in 2021. —Committee Chairman Peterson**

Mr. Patterson explained that this proposal was designed to help our constituents during the current Covid-19 situation by giving any communities interested in applying to the Main Street Program an additional 30 days, until August 31, 2020 to submit an application. The Texas Government Code states that each year the commission shall designate certain municipalities to participate in the program as official main street cities while the Texas Administrative Code states that applications to the program are due annually on the last working day of July or other dates established by the Commission. A longer deadline extension would require staff to shift schedules including but not limited to, the evaluation period, program start dates, and the First Lady's Tour. At this time, it is unknown how many, if any applications will be received. The cost to fund the local program is significant for a community and the long-term effects to the economy are not known. If no applications are received it may be prudent for staff to look at offering a supplemental cycle later in the year.

Commissioner Donnelly asked if staff were aware of any applications that would be forthcoming. Mr. Patterson stated that he was not aware of any at this time. Staff has developed a deadline when a community informs of their interest in applying by submitting a Letter of Intent, coming up in the next couple of weeks. However, submission of the letter is not mandatory, so staff has in the past received applications from communities unexpectedly. Mr. Patterson stated he would be unsurprised if no applications were received this year, based on the financial commitment the community must make and the economic hardship some cities may be facing.

Chairman Peterson asked if there had been any progress on developing an affiliate program that may be less costly for some communities. Mr. Patterson stated that the groundwork had been laid in the administrative code and that the expansion of the program was in the agency's strategic plan. The staff will likely begin development of the affiliate program between now and January before bringing it back to the Committee for input. Currently as part of the administrative code adopted by the Commission, there are the probationary and leave of absence status that can be used to help a community in unique or challenging circumstances.

Commissioner Garcia moved to recommend to the full commission, extension of the Texas Main Street Program application deadline until August 31, 2020 for program entry in 2021. Seconded by Commissioner White. Motion passed unanimously.

**5. Community Heritage Development Division update and committee discussion —*Division Director Brad Patterson***

**A. Update on Real Places Conference**

Between 2016 and 2020 the conference has more than doubled in both registration and outside revenue. Plans were on track for the 2021 conference, but a decision has been made in consultation with Administration and the Executive Committee to postpone the in-person conference. There is significant financial risk for both the agency and the Friends of the Texas Historical Commission if the conference is held as planned but with minimal attendance. Instead a high quality online Real Places 2021 event of more modest scale will be created. This will allow the agency to keep the brand, awareness and momentum going while mitigating some of the risk. Mr. Patterson stated that tentatively the event would have a half day of one or two of keynote speakers and some educational sessions. Currently staff is not contemplating a three-day online event. The Doubletree Hotel has agreed to apply the cancelation fees towards the deposits on the hotel for the 2022 and 2023 conference at their hotel. While there is a risk making commitments two and three years out, steps will be taken to minimize them. Chairman Peterson stated he thought this was a good solution in helping to reduce costs and lessened the agency's risk of losing the entire deposit. Commissioner White felt it showed our sponsors that the agency is committed to keeping the conference going and that there is an understanding of what the issues are. Commissioner Donnelly questioned how the agency awards would be handled. Mr. Wolfe stated that in other years prior to the conference, awards were presented in various ways including presenting the Governor's Award at the Governor's office or Museum awards presented at the museum. Chairman Peterson stated that another option would be to present them at one of the Quarterly meetings. The awards program will proceed and staff will look at alternatives to the banquet.

**B. Update on the Texas Main Street Program activities including staffing, DowntownTX.org, and relationship with Texas Downtown Association.**

Main Street recognition signs have been manufactured and delivered except to a small handful of cities. Response from the communities has been extremely positive and a good percentage have begun taking steps to order more at their own expense. The Main Street NOW conference has been cancelled and the funds raised are being returned to the sponsors. There were nearly 30 cities lined up for Imagine the Possibilities Tours in May, which show off available properties, both for sale and for lease. These tours have now been postponed until later in the year. In response to the virus, Main Street Staff initiated weekly conference calls with Main Street cities creating a sounding board on Covid – 19 challenges including business closures, decreasing tax revenue, belt-tightening, and furloughs as well as identifying resources we can direct them toward. DowntownTX.org is ongoing with 51 cities live and 44 still in progress. As communities feel they are ready to go live Kylie Woodlock is helping them through that process. The Texas Downtown Association (TDA) was created by Anice Read, as an independent non-profit dedicated to all downtowns, not just historic or Main Street. Staff holds an ex-officio role on its board and are very active with the organization. Traditionally the partnership between the two programs has been informal, but staff is currently working on a MOU to solidify that relationship and to change from a Main Street and TDA partnership, to an agency partnership where the TDA can also work with other programs. Once a draft MOU is agreed upon it will be presented to the Commission for input or approval. The MOU will include financial sponsorship of TDA's annual conference, which in the past has often been framed with Main Street as co-hosts but with no direct financial obligations. Financial sponsorship would allow a more formal title role for this important conference to our program and constituents.

**C. Update on heritage tourism activities including Texas Heritage Trails Program** Staff has received a draft of the strategic plan for the Texas Heritage Trails Program. Once finalized staff will shift into implementation of the plan. Staff has requested Department of Information Resources (DIR) approval to solicit a vendor to redesign the Texas Time Travel websites. Chairman Peterson asked how well the Texas Time Travel site is visited and utilized. Mr. Patterson stated that the website is dated and in need of an overhaul. Over time traffic has declined significantly reminding them that when the site was started there was a significant amount of money spent on marketing which clearly drove people to the site. When the marketing stopped there was an obvious decline in visitation to the site. Currently, during the virus, visitation has gone up, and according to Mark Wolfe there has been a 70% increase in visitation over the last two months.

**D. Update on Certified Local Government Program activities including grants, training, and prospective CLGs.**

CLG staff has shifted trainings and four-year evaluations online. In January the Commission authorized FY19 funds returned by the City of Dallas to be used for other grant projects. Many of those projects were travel grants to attend the NAPC Forum. Unfortunately, that conference has since shifted to fully online. DowntownTX.org development and the City of Arlington training are also being impacted and delayed by the Covid-19 impacts. Staff will be requesting permission to utilize the funds through FY21 and will most likely need commission approval for all or some of the reallocations at the upcoming June meeting.

Commissioner Dutia thanked the staff for doing an outstanding job working remotely while still making an impact with their programs.

**6. Adjournment**

At 1:50 p.m. the committee meeting was adjourned.

## Quarterly Report

Community Heritage Development (CHD) Division  
March–May 2020

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### **WORK IN COMMUNITIES**

The communities participating in CHD’s programs rely heavily on our staff expertise and guidance, which normally must be delivered onsite. In response to the pandemic, all CHD staff have been exclusively teleworking since mid-March with travel restrictions also in place. In a typical 2–3 month period, division staff would be expected to have visited 18–30 communities. Assistance from the division’s programs is being delivered remotely and online, with a scope and quantity comparable to traditional methods.

### **PLANNING UNDERWAY FOR REAL PLACES 2021 VIRTUAL EVENT**

Considering the pandemic and economic uncertainties, the Real Places 2021 Conference is being converted to an online-only event. The traditional in-person conference is anticipated to resume in February 2022 and 2023 at the DoubleTree by Hilton Hotel Austin near I-35 and US 290.

The online event for February 2021 will continue to provide training and networking opportunities for a broad array of our constituents and programs, but in a condensed and streamlined format. The public call for session proposals was adapted to account for the shortened and virtual event. The event will continue to incorporate specialized training and education for courthouse stewards.

Phoenix I Restoration and Construction had already committed to continue the full title sponsorship in 2021, and discussions are underway to determine if they and other sponsors will support the new format.

### **DOWNTOWNTX.ORG EXPANSION CONTINUES, WITH OPPORTUNITY TOURS POSTPONED**

The Texas Main Street Program has been hard at work expanding the DowntownTX.org website. This is the public version of the downtown online inventory project that has been supported by the Friends of the Texas Historical Commission and the Still Water Foundation.

Onsite training and orientations have been delayed due to the pandemic, but work continues on the administrative portions of the site. During this period, the Friends secured the legal services of Austin intellectual property firm, Cronin PLLC. They will help complete the research and due diligence phase of trademark/wordmark considerations as well as draft use agreements and similar documents necessary for the site. These services are paid from private funds.

Building inventories, resource surveys, appraisal data, incentive information, available real estate, and historic districts are mapped and displayed on DowntownTx.org for 50 Texas communities.

A total of 96 communities are either live (as noted above) or in the process of data integration. To date, 18,979 properties have been inventoried, including 551 locally designated landmarks, 2,623 properties that contribute to local districts, 331 National Register-listed properties, and 2,744 parcels that contribute to National Register districts.

The fourth annual “Imagine the Possibilities” tours of available downtown properties for lease or sale across Texas has been postponed until the fall. A record 30 communities were planning tours to coincide with Preservation Month (May), although some will do them online. The THC will coordinate publicity during the tours to market the events and DowntownTX.org.

## **MAIN STREET PROGRAM**

The 2020 First Lady's Tour of new Texas Main Street Programs planned for early June in Hamilton and Mineral Wells has been postponed. The events will be rescheduled when the agency, local communities, and First Lady agree it is safe and feasible to do so. The traditional format of the tour may need to change this year given the circumstances.

## **HERITAGE TOURISM**

The strategic planning process for heritage tourism and the Texas Heritage Trails Program is nearing completion. Facilitator Alysia Cook of Opportunity Strategies, LLC has identified the following draft priorities and goals:

### **Strategic Priority #1: Raise the Standards of Heritage and Cultural Attractions around the State**

- Goal A: Enhance the Visitor Experience
- Goal B: Explore Various Grant Opportunities
- Goal C: Visitor Experience Development

### **Strategic Priority #2: Foster Heritage Preservation and Education**

- Goal A: Honor the Statewide Historic Preservation Plan
- Goal B: Create Opportunities for Cross-Region Information and Content Sharing
- Goal C: Host Workshops/Seminars
- Goal D: Provide Customer Experience Hospitality Training

### **Strategic Priority #3: Encourage Regional Cooperation and Promotion of Heritage and Cultural Attractions**

- Goal A: Develop Communications Plans
- Goal B: Provide Technical Assistance to the Trail Regions
- Goal C: Maximize State Fair Booth Benefits
- Goal D: Develop Detailed Visitor Avatars/Personas
- Goal E: Provide Robust Marketing Assistance to the Trail Regions
- Goal F: Increase Real Places Conference Engagement Among Trail Regions

### **Strategic Priority #4: Foster Effective Local Tourism Leadership and Organizational Skills**

- Goal A: Heritage Tourism Program Staff to Increase Frequency of Field Visits
- Goal B: Trail Region Boards to Increase Frequency of Field Trips
- Goal C: Provide Increased THC Commission Information to Trail Regions
- Goal D: Modify the Existing THTP Statewide Bi-annual Joint Meeting Format
- Goal E: Establish and Nurture Strategic Alliances
- Goal F: Enhance Trail Region Board Member Effectiveness and Engagement
- Goal H: Research and Consider Modern Philanthropic Tools

Implementation strategies for each of these goals have also been identified and work is underway to establish benchmarks and metrics that will be incorporated into contracts with the regions.

## **NEW STAFF MEMBER JOINS THE DIVISION**

The Texas Main Street Program welcomes Cara Lowrimore as the new Assistant State Coordinator in June. She has a bachelor's degree in American studies and a master's degree in community and regional planning, both from the University of Texas at Austin. Her academic experience in community planning is an added benefit that can be utilized by our program.

Lowrimore served as the assistant state coordinator of Arkansas Main Street during the late 1990s, giving her familiarity with the national program and the revitalization challenges. It also gives her credibility with our Texas network and will reduce her learning curve in our position. Subsequently, she has written professionally for newspapers and other clients and worked in a variety of roles, including with an online retail start-up company. One notable position includes work for the United States Tennis Association which, despite subject matter differences, bears many similarities to the responsibilities of the Texas position.

## TEXAS HISTORICAL COMMISSION

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**Item 6.5E**  
Texas Historical Commission  
Quarterly Meeting  
June 16-17, 2020

**Consider adoption of amendments to TAC, Title 13, Part 2, Chapter 19, section 19.3 related to the Texas Main Street Program, without changes to the text as published in the March 6, 2020 issue of the *Texas Register*, 45TexReg 1525-1527**

**Background:**

The Texas Historical Commission's Texas Main Street Program is the agency's responsibility under Section 442.014, Title 4 Subtitle D of the Texas Government Code. The Texas Main Street Program utilizes a national model established by the National Trust for Historic Preservation and the agency has been the state coordinating program for more than thirty-five years. Administration of the program must comply with the requirements of the national Main Street America™ program. Local communities in Texas wishing to participate in the program must apply and participate under the auspices of the Texas Historical Commission. Currently, eighty-nine communities with populations from approximately 1,900 to 325,000 are designated in the program statewide.

The purpose of the Texas Main Street Program is to assist communities in the preservation and revitalization of their historic downtowns and commercial neighborhood districts. The Main Street Approach advocates a return to community self-reliance, local empowerment and the rebuilding of traditional commercial districts based on their unique assets: distinctive architecture, a pedestrian-friendly environment, personal service, local ownership and a sense of community. The Main Street Approach is a comprehensive strategy tailored to meet local needs and opportunities. It encompasses work in four distinct areas combined to address all the commercial district's needs. The model is based on the premise of a local organization of volunteers led by a local professional manager working in cooperation with the city and business communities. The Texas Historical Commission provides training, technical, and organizational assistance to the local participants.

The amendment to Chapter 19 clarifies existing practices. The amendment defines that the participating community is responsible for identifying the specific geographic area within which the program services are available, subject to approval by the state program. The amendment insures that the agency retains the ability to allocate state resources effectively.

The proposed rules were published in the March 6, 2020 issue of the *Texas Register* (45TexReg 1525-1527) for comment. No comments were received.

**Suggested motion:**

Move to adopt the amendments of Section 19.3 of the Texas Administrative Code, Title 13, Part 2, Chapter 19, related to the Texas Main Street Program without changes to the text as published in the March 6, 2020 issue of the *Texas Register*, 45TexReg 1525-1527

## **ADOPTION PREAMBLE**

TITLE 13 CULTURAL RESOURCES  
PART II TEXAS HISTORICAL COMMISSION  
CHAPTER 19 TEXAS MAIN STREET PROGRAM

### **13 TAC §§19.3**

The Texas Historical Commission (“THC”) adopts an amendment to Section 19.3 of Chapter 19 (Title 13, Part II of the Texas Administrative Code) relating to the Texas Main Street Program (“the program”). The amendment is adopted without changes to the proposed text published in the March 6, 2020 issue of the Texas Register (45 TexReg 1525-1527). The THC received no comments in response to the March 6, 2020 publication.

The THC’s Texas Main Street Program is the agency’s responsibility under Section 442.014 of the Texas Government Code. The Texas Main Street Program utilizes a national model established by the National Trust for Historic Preservation and the agency has been the state coordinating program for more than thirty-five years. Administration of the Program must comply with the requirements of the national Main Street America program and those set by the Texas Legislature. Local communities in Texas wishing to participate in the Program must apply and participate under the auspices of the THC. Currently, eighty-nine communities with populations from approximately 1,900 to 325,000 are designated in the Program statewide.

The purpose of the Texas Main Street Program is to assist communities in the preservation and revitalization of their historic downtowns and commercial neighborhood districts. The THC provides training, technical, and organizational assistance to the local participants.

The amendment to Chapter 19 clarifies existing practices. The amendment defines that the participating community is responsible for identifying the specific geographic area within which the Program services are available, subject to approval by the state program staff. The amendment insures that the agency retains the ability to allocate state resources effectively.

**STATUTORY AUTHORITY.** Amendments to Sections 19.3 of Chapter 19 (Title 13, Part II of the Texas Administrative Code) relating to the Program is adopted under Section 442.005(q) of the Texas Government Code, which provides the THC with the authority to promulgate rules for the effective administration of its programs under the chapter, and under Section 442.014 of the Texas Government Code which provides THC with the authority to administer the Texas Main Street Program.

**CROSS REFERENCE TO STATUTE.** The adopted amendment implements Section 442.014 of the Texas Government Code. No other statutes, articles, or codes are affected by this amendment.

The THC hereby certifies that the adopted amendment has been reviewed by legal counsel and found to be a valid exercise of the agency's authority.

**TITLE 13        CULTURAL RESOURCES**

**PART 2 TEXAS HISTORICAL COMMISSION**

**CHAPTER 19    TEXAS MAIN STREET PROGRAM**

**RULE §19.3 Definitions**

When used in this chapter, the following words or terms have the following meanings unless the context clearly indicates otherwise:

- (1) Texas Main Street Program--A program of the Commission in which designated Texas Main Street cities receive assistance for the preservation and revitalization of their historic downtowns or commercial neighborhood districts.
- (2) Texas Main Street City--Any city that has been officially designated by the Commission as a participant in the Texas Main Street Program as a Texas Main Street Small City, Texas Main Street Urban City, or Texas Main Street Recertified City.
- (3) Texas Main Street Small City--Main Street city with population of 50,000 people or fewer based on the most recent decennial census.
- (4) Texas Main Street Urban City--Main Street city with population of 50,001 or more people based on the most recent decennial census.
- (5) Texas Main Street Provisional City--A Main Street city of any size that is not accepted upon first application submittal may participate provisionally in the program, upon invitation, while application is resubmitted the next application period.
- (6) Texas Main Street Recertified City--A city that was formerly in the program that has reapplied and been accepted to be a Texas Main Street City.
- (7) Main Street Interagency Council--A council that evaluates and ranks Main Street applications and makes recommendations to the Commission. The composition of the Main Street Interagency Council is determined by the Commission.
- (8) Texas Main Street Affiliate--A city or commercial neighborhood district that has been accepted by the Commission to participate in the program as an affiliate with fewer responsibilities, benefits, and services than a Texas Main Street City. The designation of affiliates is subject to available Commission resources and may be limited based on population or other factors.
- (9) Probationary Status--A temporary time period in which a Texas Main Street City, by written agreement with the Commission, is permitted to maintain its status as a designated Main Street in order to resolve deficiencies or issues within their city's local Main Street program.
- (10) Leave of Absence--A temporary time period, not to exceed one year, in which a Texas Main Street City may suspend participation in the Texas Main Street Program while retaining the option to return to participation at the end of the period without needing to reapply to be a Texas Main Street Recertified City. The city is not considered an officially designated

Texas Main Street City during the Leave of Absence. This status may only be utilized one time by any single Texas Main Street City and may not be renewed or extended.

(11) Main Street Program Area: Geographic area within a Texas Main Street City where the Commission may provide technical assistance under the program. The program area shall be a defined, historic commercial core, corridor, or district with a concentration of historic commercial buildings. The program area is defined by the local community and is subject to review and possible amendment by the Texas Main Street Program.

# TEXAS HISTORICAL COMMISSION

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Item 11.2  
Texas Historical Commission  
Quarterly Meeting  
June 16-17, 2020

## Consider Amendment of January 2020 CLG Grant Awards and Reallocation of Available FY 2019 Grant Funds

### **Background:**

The THC annually assists local historic preservation programs of Certified Local Governments (CLGs) through the administration of subgrants funded by the Historic Preservation Fund (HPF) allocation of the National Park Service to the agency. The THC must set at least ten percent (10%) of this annual figure aside for distribution to the CLGs. In FY 2019, we received \$143,621 to allocate as subgrants which the Commission awarded in January 2019. Typically, recipients have until September 30, 2020 to utilize FY 2019 funds. THC is pursuing an extension from the National Park Service to expend the FY19 funds for up to one (1) year beyond the original September 2020 deadline due to delays caused by COVID-19.

The City of Dallas cancelled their FY19 CLG Grant award of \$45,000 and those funds were reallocated at the January 2020 meeting, including utilizing these unexpended funds towards the travel stipends for FORUM20 in Tacoma, Washington for 30 participants. However, due to COVID-19, the conference was moved to a virtual platform, eliminating the need for travel stipends.

### **Reallocation of FY19 Grant Funds: Redirect Travel Stipends to Cover Registration Fees**

The new registration amount for the virtual conference is \$100 per registrant. This amount will be allocated for the previously approved recipients of the travel stipends. The change in scope will allow approximately 30 recipients from nine CLG communities to receive specific preservation training that will result in a widespread benefit for communities in the state. Registration grants will be implemented on a reimbursement basis with appropriate documentation of registration and a signed affidavit of attendance to virtual FORUM required prior to receiving funds. No financial match will be required of recipients due to the circumstances and small size of the grants. The change from travel stipends to registration significantly lowers the total grant cost and results in a balance of FY 2019 funds that still need to be reallocated.

### **Reallocation of FY19 Grant Funds: Provide Additional Funding to Already Approved FY 2020 Grant Projects**

The remaining FY19 funds will first be reallocated to fully fund the City of Plano project which did not receive their full request in January due to lack of grant funds. Second, COVID-19 has placed unexpected stress on local governments and staff believes these extra funds will help ensure these communities reach their preservation goals. Staff recommends that the remaining balance of FY 2019 funds be reallocated proportionally to already approved FY 2020 recipients. Consideration was given to offering a supplemental round of applications; increasing awards to FY 2019 recipients; or funding projects in either round that were not previously selected. All these options were eliminated in favor of supplementing the funding of FY 2020 grants that are just beginning and will be subject to the most fiscal pressures. Therefore, remaining FY 2019 funds will be reallocated by increasing grant awards by 15-percent (15%) to most FY 2020 projects, as shown below. In order to provide the most financial benefit, the additional funds will not require additional match from the recipients, thus resulting in less than 1:1 matching in some cases. These increased awards will permit recipients to reduce their local contributions if fiscally necessary.

### **Additional Information:**

## TEXAS HISTORICAL COMMISSION

Through authority previously granted by the Commission, the Executive Director is permitted to redirect any FY 2019 or 2020 grant funds from one recipient to another in the event a grant award is fully or partially forfeited, unexpended, or relinquished during the FY 2019 or 2020 grant period. The purpose of this authority is to ensure that the maximum amounts of funds are utilized by Texas communities rather than being returned unexpended to the federal agency.

### Amended CLG Grant Awards:

CLG	Project Description	FY19 Rec. Funding	FY20 Rec. Funding
<b>NAPC FORUM</b>			
<b>Kingsville</b>	2 registrations	\$200	\$0
<b>Fort Worth</b>	4 registrations	\$400	\$0
<b>Plano</b>	4 registrations	\$400	\$0
<b>Rio Grande City</b>	1 registration	\$100	\$0
<b>San Antonio</b>	7 registrations	\$700	\$0
<b>Seguin</b>	2 registrations	\$200	\$0
<b>Waxahachie</b>	2 registrations	\$200	\$0
<b>Paris</b>	4 registrations	\$400	\$0
<b>Tyler</b>	4 registrations	\$400	\$0
<b>FY 2019 RECIPIENTS</b>			
<b>FY 2019 Austin</b>	Old Austin Neighborhood Survey, supplemental award amount approved Jan. 2020.	\$2,000	\$0
<b>FY 2020 RECIPIENTS</b>			
<b>Ft. Worth</b>	Historic Resource Survey Update, Phases 3b/c, 4b	\$6,375	\$42,500
<b>San Angelo</b>	Historic Downtown Survey	\$2,625	\$17,500
<b>Comal County</b>	New Braunfels Plaza National Register Nomination	\$675	\$4,500
<b>San Antonio</b>	Tobin Hill Neighborhood Survey	\$1,500	\$10,000
<b>Waxahachie</b>	Residential Design Guidelines	\$1,826	\$12,170
<b>Arlington</b>	Preservation Training	\$7,000	\$0
<b>Socorro</b>	Rio Vista Farm Rehabilitation Design	\$4,500	\$30,000
<b>Corpus Christi</b>	Historic Preservation Plan Update	\$3,750	\$25,000
<b>Plano</b>	Haggard Park Design Guidelines Update	\$11,450	\$15,000
<b>TOTALS</b>			
		<b>\$44,701</b>	<b>\$156,670</b>

### Suggested motion:

Move to amend the January 2020 CLG grant awards and accept the reallocation of Fiscal Year 2019 grant funds, without requiring increases in local matching, and waiving the match requirement for the registration grants.

## TEXAS HISTORICAL COMMISSION

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Item 11.2  
Texas Historical Commission  
Quarterly Meeting  
January 28-29, 2020

### **Consider Approval of the Application Ranking and Funding Recommendations for the FY 2020 Certified Local Government Grants and Reallocation of Available FY 2019 Grant Funds**

#### **Background:**

The THC annually assists local historic preservation programs of Certified Local Governments (CLGs) through the administration of subgrants funded by the Historic Preservation Fund (HPF) allocation of the National Park Service to the agency. The THC must set at least ten percent (10%) of this annual figure aside for distribution to the CLGs. In FY 2019, we received \$143,621 to allocate as subgrants and we anticipate a similar appropriation for FY 2020. These funds are contingent upon a resolution of the federal budget and notification from the National Park Service.

In addition to the regular CLG grant round, one additional call for applications were announced: Travel stipends for National Alliance of Preservation Commissions (NAPC) FORUM conference.

#### **Reallocation of FY19 Grant Funds**

The City of Dallas has cancelled their FY19 CLG Grant award of \$45,000 and those funds are now available to be reallocated. Any use of these funds retains a deadline for completion of work by September 2020 and any individual grant cannot be allocated funds from more than one fiscal year. Analysis of the unfunded FY19 grant applicants has determined that none of those projects can be expected to successfully meet the remaining time frame permitted. We propose to utilize these unexpended FY19 funds towards the Travel Stipends described below, all of which will be completed by the deadline as well as funding the FY20 application from the City of Arlington which is training proposed to be completed by the deadline as well.

Additionally, we propose to reallocate \$2,000 of the unexpended funds towards the FY19 Grant award to Old Austin Neighborhood Association (Grant Contract TX-19-0004). In last year's awards, we did not have enough funds to award their full grant request of \$12,000 and thus awarded only \$10,000. This reallocation would amend the grant contract to now match their full request.

#### **Travel Stipends**

Building on the success of the FORUM16 and FORUM18 travel stipends, staff notified all Texas CLGs that travel stipends may be available to attend FORUM20 taking place in Tacoma, Washington July 22-26. All CLGs in good standing with the program were eligible to apply. Completed applications were due on Monday, November 4, 2019 and evaluated by program staff. The score criteria prioritized applicants that had not received a CLG travel stipend in the past two years. While the CLG program has only previously been able to send a portion of applicants to FORUM, the return of FY19 grant funds is allowing all applicants to attend. The stipends will allow approximately 30 recipients from nine CLG communities to receive specific preservation training that will result in a widespread benefit for communities in the state. Travel stipend grants will be implemented on a reimbursement basis with appropriate documentation required after the event and prior to receiving funds. Registration and attendance at FORUM is a requirement of the stipend.

## TEXAS HISTORICAL COMMISSION

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FORUM is the *only* national conference specifically for preservation commission members and staff. The conference offers an opportunity for commissioners, staff, and other experts from across the country to share information and best practices from preservation's front lines.

### **Regular FY20 Grant Round**

Eligible projects include surveys of historic resources, nominations to the National Register of Historic Places, implementation of preservation plans, development of educational programming, and development/restoration projects. Special consideration is given to projects and programs that directly support the goals of the Texas Statewide Preservation Plan and those projects and programs that encourage diversity in the preservation community.

Eleven CLGs applied for a regular FY20 CLG Grant and an interdisciplinary committee of THC staff evaluated the grant requests against established criteria, giving consideration to previous grant distribution, viability of proposed projects and coordination with statewide preservation goals and objectives. The attachment details the results of this evaluation, as well as recommended funding levels.

### **Additional Information:**

Through authority previously granted by the Commission, the Executive Director is permitted to redirect any FY 2020 grant funds from one recipient to another in the event a grant award is fully or partially forfeited, unexpended, or relinquished during the FY 2020 grant period. The purpose of this authority is to ensure that the maximum amounts of funds are utilized by Texas communities rather than being returned unexpended to the federal agency.

Upon acceptance of the ranking and funding recommendations, staff will fund viable projects in the order of the rankings as federal funds become available. Funds may not be available to fund all the recommended projects.

### **Suggested motion:**

**Move to accept the reallocation of Fiscal Year 2019 grant funds along with the application ranking and funding recommendations for the Fiscal Year 2020 Certified Local Government grants based on the availability of federal funds, waiving the match requirement for the travel stipends. Individual recommended funding amounts may be adjusted as necessary to ensure efficient use of the available funds within the stipend recommendations.**

**TEXAS HISTORICAL COMMISSION**

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**Item 11.2**  
Texas Historical Commission  
Quarterly Meeting  
January 28-29, 2020

**Certified Local Government Program  
Fiscal Year 2020 CLG Grant Applications**

CLG	Project Description	Score	Grant Request	FY19 Rec. Funding	FY20 Rec. Funding	FY20 Running Total
<b>NAPC FORUM</b>			\$ 33,960.00	\$ 33,960.00		
<b>Ft. Worth</b>	Historic Resource Survey Update, Phases 3b/c, 4b	80.75	\$ 42,500.00		\$ 42,500.00	\$ 42,500.00
<b>San Angelo</b>	Historic Downtown Survey	79.63	\$ 17,500.00		\$ 17,500.00	\$ 60,000.00
<b>Comal Co</b>	New Braunfels Plaza National Register Nomination	74.13	\$ 4,500.00		\$ 4,500.00	\$ 64,500.00
<b>San Antonio</b>	Tobin Hill Neighborhood Survey	73.88	\$ 10,000.00		\$ 10,000.00	\$ 74,500.00
<b>Waxahachie</b>	Residential Design Guidelines	73.88	\$ 12,170.00		\$ 12,170.00	\$ 86,670.00
<b>Arlington</b>	Preservation Training	73.13	\$ 7,400.00	\$ 7,000.00		
<b>Socorro</b>	Rio Vista Farm Rehabilitation Design	72.25	\$ 30,000.00		\$ 30,000.00	\$ 116,670.00
<b>Corpus Christi</b>	Historic Preservation Plan Update	70.63	\$ 25,000.00		\$ 25,000.00	\$ 141,670.00
<b>Plano</b>	Haggard Park Design Guidelines Update	67.13	\$ 23,000.00		\$ 15,000.00	\$ 156,670.00
<b>Travis Co</b>	Historic Resource Survey for 3-6 parks	63.13	\$ 25,000.00		\$ -	
<b>Austin</b>	Jobe House Exterior Construction	62.50	\$ 30,000.00		\$ -	
<b>FY19 Austin Amendment</b>				\$ 2,000.00		
<b>Total</b>			\$ 261,030.00	\$ 42,960.00	\$ 156,670.00	

Should additional funds become available for grants, additional awards up to the maximum grant requests will be made in descending order of scores, beginning with Plano.

**Certified Local Government Program  
Fiscal Year 2020 CLG Grant Applications – NAPC FORUM Travel Stipends  
(Utilizing available FY 2019 funds)**

CLG	Number of Attendees	Score	Funding	Running Total
<b>Kingsville</b>	2	18	\$ 2,400.00	\$ 2,400.00
<b>Ft Worth</b>	4	16	\$ 4,800.00	\$ 7,200.00
<b>Plano</b>	4	12	\$ 4,800.00	\$ 12,000.00
<b>Rio Grande City</b>	1	12	\$ 1,200.00	\$ 13,200.00
<b>San Antonio</b>	7	11.5	\$ 7,826.00	\$ 21,026.00
<b>Seguin</b>	2	11	\$ 2,106.00	\$ 23,132.00
<b>Waxahachie</b>	2	10.5	\$ 2,297.92	\$ 25,429.92
<b>Paris</b>	4	10	\$ 3,730.00	\$ 29,159.92
<b>Tyler</b>	4	8	\$ 4,800.00	\$ 33,959.92

## TEXAS HISTORICAL COMMISSION

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**Item 11.3**  
Texas Historical Commission  
Quarterly Meeting  
June 16-17, 2020

### **Consider amendment of the biennial funding plan for the Texas Heritage Trails Program**

#### **Background:**

The Texas Historical Commission (THC) is charged with promoting heritage tourism by assisting local governments, organizations, and individuals in the preservation, enhancement, and promotion of heritage and cultural attractions in the state. The program is required to include efforts to:

- Raise the standards of heritage and cultural attractions around the state
- Foster heritage preservation and education
- Encourage regional cooperation and promotion of heritage and cultural attractions
- Foster effective local tourism leadership and organizational skills

The Texas Heritage Trails Program has been the primary vehicle for providing heritage tourism leadership and assistance to the state. The 86<sup>th</sup> Texas Legislature appropriated \$1,000,000 each year of the FY 2020-21 biennium to support the Texas Heritage Trails Program (THTP). The Commission approved a biennial funding plan for the program in July of 2019.

Beginning in March of this year, COVID-19 has caused unprecedented damage to the travel and tourism industry across the country due to closures, travel restrictions, social distancing, and job loss. The economic damage to Texas and the communities within will be severe. The loss of hotel occupancy tax and sales tax revenue could prevent cities and travel organizations like convention and visitor bureaus, chambers of commerce, and attractions from fully promoting and supporting travel and tourism locally and regionally.

The Texas Heritage Trails Program trail regions rely on supplemental funding and partnerships from these organizations in order to effectively operate. The future timeline and extent of the economic impact as well as the details of the eventual recovery are unknown. Therefore, the agency staff recommend that the previously adopted biennial funding plan be amended for FY 2021 to provide reasonable, financial flexibility to the regions while maintaining appropriate agency oversight and expectations of deliverables and services provided by the regional nonprofits. No revisions are required for the current fiscal year ending in August.

The total \$81,500 maximum of state funds made available to each region will not change, however regional matching requirements will be reduced for FY 2021, compared to the originally adopted plan. The base amount provided to each region for their services will be increased from \$50,000 to \$70,000 while the amount requiring a direct match will be reduced from \$31,500 to \$11,500, keeping the total funding level unchanged. The ratio of cash match to state funds was scheduled to go from 2:1 down to 1.75:1 modestly increasing the required regional cash match to achieve the maximum state funds. The proposed amendment instead keeps the 2:1 ratio steady for FY 2021. With the higher amount of base funding, those funds will be disbursed evenly over four payments in FY 2021. All other stipulations of the adopted plan remain.

## TEXAS HISTORICAL COMMISSION

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There remains a reasonable expectation in the plan's design that each region will be able to achieve \$81,500 annually in state financial support. It is anticipated that future funding plans will return to requirements similar to the previously adopted plan, should the economic conditions warrant in the next biennium.

More details are shown on the attached Amended Texas Heritage Trails Funding Plan for FY 2020-2021.

**Suggested motion:**

Move to approve the amended biennial funding plan for the Texas Heritage Trails Program for fiscal years 2020 and 2021.

### **Base Contract Amount**

- FY 20: The \$50,000 base amount per region will be distributed quarterly, \$15,000 on or about September 1; \$15,000 on or about December 1; \$10,000 on or about March 1; \$10,000 on or about June 1.
- FY 20: The distribution is front-loaded in the first half of the year to help regions manage cash flow, considering lower reserves and the time necessary to raise matches.
- FY 21: The \$70,000 base amount per region will be distributed in four quarterly payments of \$17,500 based on a schedule to be outlined in the FY 21 contracts with each region.

### **Additional Amount Eligible to be Earned Through Matching**

- FY 20: Each region is permitted to earn an additional \$31,500 annually by documenting allowable cash and in-kind matches from a variety of sources.
- FY 21: Each region is permitted to earn an additional \$11,500 annually by documenting allowable cash and in-kind matches from a variety of sources.
- Unclaimed portions of the match may be rolled over to the following fiscal year for the same region to request reimbursement at the discretion of the THC and only as permissible by any restrictions on appropriations. THC does not guarantee that unclaimed funds will be available to be claimed in subsequent years and regions leaving balances do so at their own risk.
- Regions are encouraged to cite the match requirement when soliciting local support.

### **Additional Amount Eligible to be Earned Through Cash Matching**

- For FY 20, cash will be matched at \$2 state funds for each documented \$1 from the region until the total additional \$31,500 is achieved by the region.
- For FY 21, cash will be matched at \$2 state funds for each documented \$1 from the region until the total additional \$11,500 is achieved by the region.
- Cash may be donations, memberships, payments for services or participation in projects, or other similar gross revenue approved by THC. Local match can come from both public and private sources including governmental entities, individuals, corporate etc. and may be local or regional in nature.
- Revenue earned by the Trails LLC during the period may be counted as cash match by LLC participants at the time it is earned.
  - LLC will need to report earnings attributed to each region periodically and the region will submit the documentation to THC in their match request.
- Regions with unusual revenue sources or unique arrangements may be evaluated to determine the appropriate matching method and calculation.
- Funds provided by THC may not be used for matching purposes.

### **Additional Amount Eligible to be Earned Through In-kind Matching**

- Up to \$8,250 of in-kind support may be used as match at 1:1 ratio in lieu of cash revenue or other financial support. In-kind matching is not required, and a region may choose to claim the full maximum available via cash matching.
- Allowable in-kind expenses include donated goods or services as well as documented volunteer time or travel of board members and partners necessary to fulfill the region's mission.
- Maximum In-kind rates may be set by THC and shall not exceed IRS or state limits.
- Goods or services provided by other THTP regions or that may otherwise have been funded by THC may not be utilized as match.

### **Reimbursement Requests for Matching**

- Requests for reimbursement based on regional matching may be submitted between September 1 and June 30 of the fiscal year. This cutoff is necessary for year-end processing at THC. However:
  - Funds or in-kind raised between July 1, 2019 and August 31, 2019 may be used as match in fiscal year 2020
  - Funds or in-kind raised between July 1, 2020 and August 31, 2020 may be used as match in fiscal year 2021
- Reimbursement may not be requested more frequently than monthly.
- Requests must be received by the first business day of the month to be paid the following month. (THC will strive to reduce the turnaround whenever possible.)
- Except for the final request of the year, requests shall not be for amounts less than \$1,000 in funds to be reimbursed.

### **Other Funding Requirements**

- Regions must expend the state funds and any required local match to provide heritage tourism services. No more than 20 percent of the combined state funds may be carried over from year to year or otherwise held in reserve without agency approval.
- Financial penalties may be imposed upon a region for non-performance, including for non-compliance with reporting requirements.

## TEXAS HISTORICAL COMMISSION

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**Item 11.4**  
Texas Historical Commission  
Quarterly Meeting  
June 16-17, 2020

### **Consider extension of the Texas Main Street Program application deadline**

**Background:**

Currently 89 designated cities receive services from the Texas Main Street Program, which was begun under the Texas Historical Commission in 1981. The Texas Government Code, Section 442.014(b) states, “Each year the commission shall designate certain municipalities to participate in the program as official main street cities.” This can be interpreted to mean that applications and subsequent designations must occur annually. In accordance with Texas Administrative Code, Title 13, Part 2, Chapter 19, §19.4 (a): “Applications to the program are due annually on the last working day of July or other dates established by the Commission”.

Due to business interruptions to local governments and other organizations in prospective communities caused by COVID-19, staff recommends extending the application deadline until August 31, 2020. Although only a one-month delay, this provides extra time for communities interested in the program to complete their application materials which are significant. Unfortunately, a longer extension would significantly hamper the staff and Main Street Interagency Council (IAC) review which is required in time for the October Commission meeting.

The applicants chosen by the Commission at the October meeting will be designated as an official Texas Main Street City and will formally enter the program January 1, 2021.

**Suggested motion:**

Move to approve extension of the Texas Main Street Program application deadline until August 31, 2020 for program entry in 2021.

## TEXAS HISTORICAL COMMISSION

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**Item 11.5**  
Texas Historical Commission  
Quarterly Meeting  
June 16-17, 2020

### **Consider adoption of the Strategic Plan for the Texas Heritage Tourism Program and Texas Heritage Trails Program**

#### **Background:**

The Texas Sunset Commission recommended that a new strategic plan be developed for the Texas Heritage Trails Program to replace one implemented more than 10 years prior. With the assistance of an outside planner and facilitator, the agency staff has completed a planning process applicable to both the broader Heritage Tourism Program and the Texas Heritage Trails Program. The planning included listening sessions with each of the ten independent trail regions as well as agency staff whose programs have or may have future relationships with heritage tourism. The staff and leadership of the agency and of the regions convened a planning meeting in February 2020 to develop the contents of the plan. The professional planner and agency staff subsequently developed the formal planning document.

The Texas Heritage Tourism Program and Texas Heritage Trails Program 2020-2025 Strategic Plan document is in final draft form, awaiting feedback from ten heritage trail regions. Appendix A: Key Performance Indicators and Appendix B: Standards for Point of Interest Listing are still in development, in part to coincide with the contract revisions that are underway with the Office of the Attorney General and the regions. Since those appendices and any revisions to address Commission or region feedback will need to be accommodated, staff recommends that authority for final document approval be delegated to the Executive Director, rather than waiting until the October Commission meeting. New contractual agreements with the regions that reflect the priorities of this strategic plan need to be implemented by September 1, 2020.

#### **Suggested motion:**

Move to adopt the Strategic Plan for the Texas Heritage Tourism Program and Texas Heritage Trails Program and to delegate approval of the final plan to the Executive Director.



# Texas Heritage Tourism Program & Texas Heritage Trails Program

2020-2025  
Strategic Plan

# ACKNOWLEDGMENTS

Opportunity Strategies LLC would like to thank the following individuals and organizations for their participation in this planning process.

## **Texas Historical Commission Representatives**

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*Texas Historical Commission*

Brad Patterson, Community Heritage  
Development Division Director  
*Texas Historical Commission*

Sarah T. Page, Heritage Tourism Program  
Coordinator  
*Texas Historical Commission*

Teresa Caldwell, Heritage Trails Program  
State Coordinator  
*Texas Historical Commission*

Susan Shore, Heritage Tourism Program  
Development Specialist  
*Texas Historical Commission*

*Additional THC staff from other Divisions  
and Programs including:*

*Historic Sites Division*

*Texas Main Street Program*

*Certified Local Government Program*

*County Historical Commission*

*Outreach Program*

*Administration Division*

*Architecture Division*

*Texas Historic Courthouse*

*Preservation Program*

*Museum Services Program*

*Communications Division*

*Cemetery Preservation Program*

## Texas Heritage Trail Regions Representatives

### *Texas Brazos Trail Region*

Andrea Barefield, Executive Director  
Coleman Hampton, Board Chair  
Joy Summar-Smith, Vice Chair

### *Texas Forest Trail Region*

Del Polikretis, Executive Director  
Holli Forniquet, Board Chair  
Marty Prince, Former Executive Director

### *Texas Forts Trail Region*

Tammie Virden, Executive Director  
Owen Miller, Board Chair  
Margaret Hoogstra, Former Executive Director

### *Texas Hill Country Trail Region*

Joanne Crawford, Executive Director  
Debra Stifflemire, Board Chair

### *Texas Independence Trail Region*

Seneca McAdams, Executive Director  
Pam Summers, Board Chair

### *Texas Lakes Trail Region*

Jill Campbell, Executive Director  
Heather Juarez, Board Chair

### *Texas Mountain Trail Region*

Wendy Little, Executive Director  
Robert Alvarez, Board Chair  
Randall Kinzie, Vice Chair

### *Texas Pecos Trail Region*

Melissa Hagins, Executive Director  
Brenda Kizziar, Board Chair  
Ellen Crossland, Former Board Chair

### *Texas Plains Trail Region*

Allison Kendrick, Executive Director  
Vicki Hamblen, Board Chair  
Barbara Brannon, Former Executive Director

### *Texas Tropical Trail Region*

Nancy Deviney, Executive Director  
Valerie Bates, Board Chair



**Opportunity Strategies LLC** is community and economic development consulting firm based in Austin, Texas. Established in 2012, the firm provides customized training, professional facilitation, and strategic planning services.

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## EXECUTIVE SUMMARY

### Background

The Texas Heritage Tourism Program (HT Program) is a multifaceted Texas Historical Commission (THC) initiative that supports the development and promotion of heritage tourism statewide. Major components include:

- 1) the development of travel-related products such as printed travel guides and mobile apps,
- 2) community assistance to strengthen authentic visitor experiences in towns across the state,
- 3) supporting and promoting other THC programs that impact heritage tourism, and
- 4) the Texas Heritage Trails Program (THTP), consisting of ten (10) dedicated, regional, non-profit organizations, each led by a board and executive director working to provide marketing and visitor development assistance to heritage sites, attractions, and communities throughout each geographic region.

The Texas Heritage Trails Program (THTP) is the THC's award-winning heritage tourism initiative that encourages communities, heritage regions, and the state to partner in preserving and promoting Texas' historic and cultural resources. The division supports heritage tourism by assisting local governments, organizations, and individuals in the preservation, enhancement, and promotion of heritage and cultural attractions in the state.

Each of the ten Trail Regions across Texas is a separate nonprofit organization that has its own volunteer board of directors and paid executive director. Each has its own assets and liabilities and strengths and challenges and brings together hundreds of regional volunteers through partnerships, memberships, and collaborations. Their efforts help millions of travelers make their way to state historic sites and other heritage and cultural attractions throughout the state of Texas.

The THC provides training, technical and organizational assistance, and is the primary funding stream to the Trail Regions.

### Purpose

The purpose of this Strategic Plan is to enhance the incorporation of the Texas Heritage Tourism Program with the agency's other programs, therefore creating efficiencies and helping the Texas Historical Commission leverage its impact across the state while benefiting the Trail Regions. This product was suggested by the [Texas Sunset Advisory Commission findings of January 2019](#). Recent recommendations for the HT Program include better integration of the THTP into the THC's long-term planning. Specifically, *"the regional structure of the THTP provides an existing framework to support THC projects across the state, allowing the agency to develop heritage preservation efforts and expand the reach of other geographically diverse*

*programs like historical markers, historic sites, Main Street cities, and historic county courthouse renovations.”*

The HT Program must balance formalizing a system that is streamlined and uniform in design, but also respects some necessary regional autonomy in execution. Striking that proper balance is what this document has been developed to fulfill.

## **Process**

The process began in the fall of 2019. After meeting with THC staff to determine project parameters, the consultant embarked on a number of listening sessions. The first ten listening sessions were half-day facilitated discussions with each Trail Region board and staff in their respective region. Results of the discussions were recorded anonymously and aggregated with others' responses.

The eleventh listening session was with Heritage Tourism Program management and staff and the twelfth was with staff from THC's other Divisions to solicit their feedback and discuss areas of improvement from an internal partner standpoint.

All feedback was compiled, analyzed, and shared with Heritage Tourism staff internally, then again at an all-partner joint strategic planning session held in February 2020 in Georgetown, Texas. Each Trail Region executive director and board chair (or other board representative if the board chair was unavailable) participated in the strategic planning session as well as the entire Heritage Tourism team and other THC partners and management. Results from that joint strategic planning session are incorporated throughout this document, coupled with other consultant recommendations.

## **Agency Guideposts**

The [2011-2020 Texas' Statewide Historic Preservation Plan](#) and the [2019-2023 THC Strategic Plan](#) each serve as guideposts for the development of this Strategic Plan. There are goals in each of these two THC Strategic Plans that can be partially fulfilled through the implementation of the goals and strategies in this plan. They are designed to work in unison to achieve the mission of the THC.

The development and implementation of this Strategic Plan helps fulfill two of the eight goals within Texas' Statewide Historic Preservation Plan:

- **Leverage Economic Development Tools:** “Communities leverage preservation-based and traditional economic development tools to revitalize historic areas.”
- **Learn and Experience History through Place:** “Texas residents and guests of all ages learn and experience the state's diverse history through formal education, recreation, and everyday interactions with historic places.”

The development and implementation of this Strategic Plan helps fulfill two of the four Agency Operational Goals within the THC Strategic Plan:

- **Encourage Economic Development, Tourism, and Education:** “Encourage economic development, tourism, and heritage education through historic places in partnership with local public, private, and nonprofit entities.”
- **Maximizing Quality and Effectiveness of Services:** “Cultivate an agency culture of innovation and creativity that results in a motivated and diverse staff working to maximize the quality, efficiency, and effectiveness of services to the public.”

## **Outline**

This Strategic Plan includes 4 Strategic Priorities and provides several goals and strategies for each. These are:

### **Strategic Priority #1: Raise the Standards of Heritage and Cultural Attractions around the State**

Goal A: Enhance the Visitor Experience

Strategy 1: Heritage Tourism Site Standards are Re-established

Strategy 2: All Points of Interest Must Meet the Criteria

Goal B: Explore Various Grant Opportunities

Strategy 1: Trail Regions to Explore Grant-Making Opportunities

Strategy 2: Heritage Tourism Program to Leverage Existing Agency Grants

Strategy 3: Heritage Tourism Program to Explore Grant-Making Opportunities

Strategy 4: Seek Grants from Other Sources

Goal C: Visitor Experience Development

Strategy 1: Develop an Initiative to Enhance Visitor Experiences in Communities

### **Strategic Priority #2: Foster Heritage Preservation and Education**

Goal A: Honor Texas’ Statewide Historic Preservation Plan

Strategy 1: Economic Development Relationship Building

Strategy 2: Learn and Experience History through Place

Strategy 3: Trail Regions to Participate in Next Statewide Historic Preservation Plan

Goal B: Create Opportunities for Information & Content Sharing

Strategy 1: Resource Library Development

Strategy 2: Create a Speakers’ Bureau

Strategy 3: Trail Regions to Offer Workshops/Seminars

Goal C: Provide Customer Experience Hospitality Training

Strategy 1: Trail Regions to Develop Hospitality Training

Strategy 2: Trail Regions to Deliver Hospitality Training

**Strategic Priority #3: Encourage Regional Cooperation and Promotion of Heritage and Cultural Attractions**

Goal A: Develop Communications Plans

- Strategy 1: Develop a Communications Plan for the Trail Regions
- Strategy 2: Develop a Communications Plan for the Heritage Tourism Program
- Strategy 3: Provide Professional Media Training
- Strategy 4: Develop THTP Style Guide
- Strategy 5: Provide THTP Style Guide Training
- Strategy 6: Trail Regions to Utilize and Adhere to Style Guide
- Strategy 7: Provide Marketing Training Workshops
- Strategy 8: Collaborate in the Development of Marketing Materials
- Strategy 9: Design and Implement a Social Media Usage Guide
- Strategy 10: Develop and Deliver a Social Media Workshop
- Strategy 11: Ensure New Website Fully Showcases Heritage Assets
- Strategy 12: Trail Regions to Appear as Podcast Guests
- Strategy 13: THC to Explore Creating a Podcast in the Future

Goal B: Provide Technical Assistance to the Trail Regions

- Strategy 1: Provide Email Assistance
- Strategy 2: Provide Newsletter Assistance

Goal C: Maximize State Fair of Texas Booth Benefits

- Strategy 1: Standardize State Fair of Texas Booth Participation to Leverage Value

Goal D: Develop Detailed Visitor Avatars/Personas

- Strategy 1: Heritage Tourism Program Staff to Conduct Statewide and National Research
- Strategy 2: Trail Regions to Conduct Local and Regional Research
- Strategy 3: Use Research to Develop Marketing Strategies

Goal E: Provide Robust Marketing Assistance to the Trail Regions

- Strategy 1: Provide Cooperative Advertising/Marketing Consulting Assistance
- Strategy 2: Encourage Trail Regions to Participate in Travel Shows/Trade Shows

Goal F: Increase Real Places Conference Engagement Among Trail Regions

- Strategy 1: Trail Regions to Help Generate Content/Speakers for Real Places

**Strategic Priority #4: Foster Effective Local Tourism Leadership and Organizational Skills**

Goal A: HT Program Staff to Increase Frequency of Field Visits

Goal B: Trail Region Boards to Increase Frequency of Field Trips

Goal C: Provide Increased THC Commission Information to Trail Regions

Goal D: Modify the Existing THTP Statewide Semiannual Joint Meeting Format

Goal E: Establish and Nurture Strategic Alliances

- Strategy 1: Partner with Texas State Agencies and THC Divisions and Programs
- Strategy 2: Partner with the Friends of the THC
- Strategy 3: Each Trail Region to Better Engage with Historic Sites

Strategy 4: HT Program to Provide Workshops for Trail Regions on Other THC Divisions/Programs

Strategy 5: Enhance Strategic Alliances by Fostering Communications Networks

Goal F: Enhance Trail Region Board Member Effectiveness and Engagement

Strategy 1: HT Program to Provide Workshops on Interested Topics for Trail Regions' Boards and Executive Directors

Strategy 2: Equip Trail Region Boards with Tools and Templates

Goal H: Research and Consider Modern Philanthropic Tools

Strategy 1: Trail Regions to Research Legacy Giving Programs

Strategy 2: Leverage Giving Tuesday

The Strategic Priorities, Goals, and Strategies listed above set the tone for the entire HT Program and the Trail Regions. However, aligning Trail Region goals to HT Program goals does not mean that those goals are the exclusive goals a Trail Region can establish. Trail Regions are encouraged to add additional items as needed into their individual Scopes of Work and to develop their own strategies on how to help fulfill program goals.

### **What Comes Next**

#### **KEYS TO SUCCESSFUL PLAN IMPLEMENTATION**

Key 1: Ensure a Culture Shift

Key 2: Develop Standard Operating Procedures

Key 3: Organizational and Resource Alignment

There is already a culture shift underway with the Trail Regions and the Heritage Tourism Program. New exciting ideas are being explored and there is a renewed enthusiasm to work together to discover additional ways to attract and serve heritage travelers.

When these goals are pursued and these strategies implemented, the Heritage Tourism Program structure and the Texas Heritage Trails Program will be strengthened, and accountability will be increased. These accomplishments will benefit the THC, the Heritage Tourism Program, the Trail Regions, the heritage traveler, and heritage and cultural attractions across Texas for years to come.

## MISSION OF THE TEXAS HISTORICAL COMMISSION

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The mission of the Texas Historical Commission is to protect and preserve the state's historic and prehistoric resources for the use, education, enjoyment, and economic benefit of present and future generations. This Mission and Core Values are found inside the [THC Strategic Plan](#).

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## CORE VALUES OF THE TEXAS HISTORICAL COMMISSION

Core Values are beliefs that are shared among the staff and leadership of the agency and are woven into the day-to-day work, in the projects endeavored, and in the decisions made.

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- **Quality of Life:** Historic places enhance the general well-being of individuals and communities.
  - **Authenticity:** We focus on telling the real stories of the state's history through the people, places, structures, objects, and traditions that convey them authentically.
  - **Cultural Diversity:** We preserve the places and stories of Texas' rich cultural heritage and communities.
  - **Partnerships:** We work together across cultures, interests, and disciplines to achieve mutually beneficial goals.
  - **Communication:** We keep people informed and develop strong lines of communication internally and externally with partners and stakeholders.
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## TEXAS' STATEWIDE HISTORIC PRESERVATION PLAN

There are eight goals in [Texas' Statewide Historic Preservation Plan](#), two of which directly pertain to the Texas Heritage Tourism Program and are therefore included in the Strategic Priority #2: Fostering Heritage Preservation and Education.

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Texas' Statewide Historic Preservation Plan is a guiding element for use by the HT Program and the Trail Regions. The eight goals for 2011-2020 are:

- Survey and Online Inventory
  - Emphasize Cultural Landscapes
  - Implement Policies and Incentives
  - Leverage Economic Development Tools
  - Learn and Experience History through Place
  - Connect Preservation to Related Fields
  - Cultivate Political Commitment
  - Build Capacity of Preservation Community
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## **MISSION OF THE TEXAS HERITAGE TOURISM PROGRAM**

The THC's Heritage Tourism Program partners with participating regional trail organizations to develop and promote strong heritage experiences throughout Texas.

The Heritage Tourism Program supports heritage tourism by assisting local governments, organizations, and individuals in the preservation, enhancement, and promotion of heritage and cultural attractions throughout Texas. This is accomplished in part through the relationships with each of the ten Heritage Trail Regions, called the Texas Heritage Trails Program. (*Source: Administrative Code, Title 13, Part 2, Chapter 30, Rule §30.1*)

This purpose must be clearly conveyed to each of the ten Trail Regions and it must be made clear that their organizations are the conduit between the THC and those local stakeholders. This purpose can become a mantra or theme that each Trail Region fully understands and rallies around.

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## **VISION OF THE TEXAS HERITAGE TOURISM PROGRAM**

A Vision Statement is the Texas Heritage Tourism Program's depiction of its desired future. It clearly and boldly declares what the Program shall one day be known as. It articulates what the entire team is working to accomplish and serves as a touchstone for crafting that dream.

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We envision Texas as a place where:

- The diverse places of the Lone Star State are preserved and promoted for present and future generations.
- Visitors and residents delight in experiencing, firsthand, the real places telling the real stories of our state's heritage and cultures.
- The total visitor experience of Texas' diverse places stimulates local economies.
- Heritage tourism is a community-based enterprise that contributes to its livability and sense of place.

## DEFINITION OF HERITAGE TOURISM

Heritage Tourism: Travel directed towards experiencing the heritage of a city, region, state, or country that enables the tourist to learn about, and be surrounded by, local customs, traditions, history and culture. (Source: [Administrative Code, Title 13, Part 2, Chapter 30, Rule §30.2.6](#))

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## GUIDING PRINCIPLES OF HERITAGE TOURISM

Guiding principles reflect the core values of an organization. They are intended to establish the framework for expected behaviors and decision-making considerations. Guiding Principles encompass the spirit of the organization, guiding the program's philosophies and culture.

This Strategic Plan is designed to reflect the five Guiding Principles in use by the Heritage Tourism Program and outlined in the Texas Heritage Trails Program's [Administrative Code, Title 13, Part 2, Chapter 30, Rule §30.2](#)

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- **Preserve and protect resources.** We will make decisions that provide preservation and protection for Texas' precious heritage tourism assets.
  - **Focus on authenticity and quality.** We will find and showcase high quality tourism attractions that exhibit the authentic Texas heritage experience.
  - **Make places come alive with interpretation.** We will continually seek new opportunities to provide interesting and dynamic understanding of heritage assets that make visitors feel a part of the experience and want to keep coming back.
  - **Find the fit between community and tourism.** We will strike a balance between respecting the communities' expectations and the tourists' desire to visit new places.
  - **Collaborate for sustainability.** We will continually work with our Trail Regions, their partners, our partners, other THC Divisions, other state agencies, and a variety of other stakeholders to maintain sustainability and commit to continuous improvement.
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## SWOT ANALYSIS

A SWOT Analysis was conducted in each of the ten Trail Region listening sessions. The facilitator asked the participants to share their opinions of the Strengths, Weaknesses, Opportunities, and Threats of the Heritage Tourism Program. Their responses were aggregated and reported to HT Program staff. The responses listed below are the ones mentioned multiple times in multiple Trail Regions.



## STRATEGIC PRIORITIES

This Strategic Plan is built on the four Strategic Priorities outlined below. These Strategic Priorities apply to the THC's Heritage Tourism Program and are mandated specifically for the Texas Heritage Trails Program in the [Texas Administrative Code, Title 13, Part 2, Chapter 30, Rule §30.1.](#)

In this document, the Strategic Priority sections discuss a variety of Goals and Strategies that could fall under a specific Strategic Priority. These suggestions are not specifically mandated, nor are they limiting. This document provides suggestions discussed in organizational meetings with the understanding the Trail Regions, in conjunction with the THC Heritage Tourism staff, will be designing individual work plans to meet their unique needs.



## Strategic Priority #1: Raise the Standards of Heritage and Cultural Attractions around the State

The quality of the visitor experience depends on quality standards being established and maintained in both products and programming. When the visitor experience is enhanced, that experience will often lead to long-term, even multi-generational stewardship. Asset protection, longevity, legacy, and financial investment are signs of visitor experiences that have been remarkable enough to lead to such stewardship.

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*TO RAISE THE STANDARDS OF TEXAS HERITAGE AND CULTURAL ATTRACTIONS, THE TEXAS HERITAGE TOURISM PROGRAM MUST ENGAGE IN ACTIVITIES THAT IMPROVE THE VISITOR EXPERIENCE. THIS IS THE RESPONSIBILITY OF BOTH THE THC HERITAGE TOURISM PROGRAM TEAM AND THE TRAIL REGIONS.*

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### Goal A: Enhance the Visitor Experience

Raising the standards to enhance the visitor experience implies first the need to re-establish the set of standards for heritage and cultural attractions around the state. Realizing some attractions are designated THC State Historic Sites and therefore already have met certain criteria, there are other attractions around the state that are promoted by the Trail Regions with lesser known standards.

#### Strategy 1: Heritage Tourism Site Standards are Re-established

Local attractions should strive to reach and maintain certain high standards. These standards have recently been updated by the Heritage Tourism Program team and are included in this strategic plan as Appendix B. Standards include a list of requirements an asset may have based on physical characteristics, safety, accessibility, signage, visitor usage, interpretation and more.

Re-establishing quality standards ensures heritage and cultural attractions around the state create experiences that encourage or ultimately result in the preservation of Texas historic treasures.

#### Strategy 2: All Points of Interest Must Meet the Criteria

These standards are to be used as a program tool by both the HT Program staff and the Trail Regions to enhance the heritage visitor experience throughout Texas, both in person and online. Recognizing that some local attractions may have physical improvements, maintenance, and visitor program needs greater or lesser than others, the Trail Regions can serve as a liaison between the attraction and one or more of the THC's programs or divisions to help them get the information they need. It could be an architectural improvement if they are housed in structures considered historic, or it could be for organization, programmatic, or exhibit development needs for Texas history museums, in which case they could work with Museum Services. The Trail Regions can recommend funding workshops such as those offered by the Friends of the Texas Historical Commission or other organizations to help research or grow an existing local point of interest funding campaign.

## **Goal B: Explore Various Grant Opportunities**

### **Strategy 1: Trail Regions to Explore Grant-Making Opportunities**

Each Trail Region should review any existing grant program they may already have and explore new opportunities to be able to provide small regional grants to help attractions, preservation, education, and other efforts within their regions. The benefits of such a grant program can be a talking point during their fundraising and friendraising efforts to solicit support. Each Trail Region should have a specific goal in their Scope of Work to raise enough additional funds to be able to provide a few such small regional grants.

### **Strategy 2: Heritage Tourism Program to Leverage Existing Agency Grants**

There are some existing grant programs within the Texas Historical Commission that should be considered by the Heritage Tourism Program team as possible matches for the Trail Regions to be able to qualify for and leverage in their communities. The Texas Preservation Trust Fund (TPTF) and the Certified Local Government (CLG) Program's annual CLG Grant Program each provide grants to protect historic resources.

The TPTF is a competitive grant distributed as a matching grant to qualified applicants for acquisition, survey, restoration, preservation, planning, and heritage education activities that lead to the preservation of historic architectural and archeological properties and associated collections of the State of Texas. CLG matching grants are available for CLG participating communities in good standing for projects leaving a lasting impact on preservation in the community. Typical projects include historic resource surveys, National Register nominations, preservation plan or design guidelines development, and property rehabilitation projects.

These are two existing grant programs within the THC that the HT Program should explore as untapped potential for the Trail Regions to possibly leverage. It is recommended that the HT Program collaborate with staff within each grant program to better learn how heritage tourism projects could benefit within their current grant program frameworks and selection criteria. If opportunity lies there, HT Program staff should teach the Trail Region executive directors about it and encourage them to identify communities and organizations within their region that may qualify and encourage them to apply.

### **Strategy 3: Heritage Tourism Program to Explore Grant-Making Opportunities**

Years ago, the Heritage Tourism Program offered modest grants to nonprofit organizations, sites, and attractions within the Trail Regions, but no longer do. One strategy is for the HT Program team to explore if and how they could reinstate or revamp that service once again, even on a smaller scale. Depending on the size of the grant program the HT Program wishes to pursue, it may also require additional funding requests. Exploring this reinstatement would be a great way for the THC and HT Program to build goodwill and provide a valuable added benefit in the communities it serves.

**Strategy 4: Seek Grants from Other Sources**

Trail Regions should explore grant opportunities that could be utilized to augment their operations funding. Friends of the Texas Historical Commission offers a workshop specifically for the purpose of identifying grants. It is recommended that Trail Regions executive directors and board members attend that workshop first as the beginning point into grant seeking before pursuing other opportunities.

The University of Texas Grants Resource Center (TGRC) is a great place to make a consultation appointment with a Grant Resource Concierge to begin the grant-seeking process. The TGRC is located in Austin and serves as a bridge between the grant-seeking and the grant-making communities. The TGRC has one of the most extensive foundation directories in the US.

In addition to centralized libraries such as this, the Trail Region executive directors should explore grant opportunities within their regions, statewide, and nationally to help fund their individual nonprofit organizations. There are likely family and/or community foundations within each region that philanthropically fund programs and/or services of interest to them. Many such foundations fund cultural and arts related projects, which is a perfect correlation to the operations of the Trail Regions themselves as well as heritage and cultural attractions and sites the Trail Regions promote.

**Goal C: Visitor Experience Development**

Visitor Experience Development is an in-depth journey into interpreting a community's heritage resources and developing programming to bring these stories to light for the public. Historic sites and museums sometimes do this well and prove to be excellent partners in this endeavor. However, not every partner is skilled in crafting visitor experiences and there are opportunities for the Heritage Tourism Program team to help. Visitor experience development with an eye toward heritage tourism for communities and points of interest is done much less frequently and should be a facilitated process complete with strong community and business commitment for long-term benefit.

**Strategy 1: Develop an Initiative to Enhance Visitor Experiences in Communities**

The HT Program staff should coordinate with qualified professionals to create Visitor Experience Development training that can be provided to communities and the points of interest within them as a long-term goal. This will ensure the most current information and techniques are used when providing the training. This can be a new service provided by either HT Program staff (once trained) or by a private sector professional and will help to raise the standards of heritage and cultural attractions by improving the experience of heritage travelers.

## Strategic Priority #2: Foster Heritage Preservation and Education

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*TO FOSTER HERITAGE PRESERVATION AND EDUCATION, THE TEXAS HERITAGE TOURISM PROGRAM MUST ENGAGE IN ACTIVITIES THAT EDUCATE AND WORK WITH REGIONAL PARTNERS AND COMMUNITIES TO PRESERVE AND INTERPRET HISTORIC RESOURCES.*

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### Goal A: Honor Texas' Statewide Historic Preservation Plan

Every 10 years the THC develops [Texas' Statewide Historic Preservation Plan](#). It's a collaborative process and one of the key responsibilities as a State Historic Preservation Office under the National Historic Preservation Act of 1966. The THC recognizes Texas' Statewide Historic Preservation Plan as an opportunity for Texans to preserve, protect and leverage the historic and cultural fabric for the betterment of communities statewide and ensures that each division within the THC helps support the others as opportunities to collaborate arise.

There are eight goals in Texas' Statewide Historic Preservation Plan for 2011-2020, two of which directly pertain to the Texas Heritage Tourism Program and are therefore included in the strategic priority of fostering heritage preservation and education. They are "Leverage Economic Development Tools" and "Learn and Experience History Through Place."

The Statewide Plan is a guiding element for use by the HT Program and the Trail Regions. These two statewide plan goals, along with suggested strategies, are discussed here.

### Strategy 1: Economic Development Relationship Building

The Texas' Statewide Historic Preservation Plan goal, "Leverage Economic Development Tools for Preservation" means that communities must leverage preservation-based and traditional economic development tools to revitalize historic areas. Expected statewide outcomes are:

- Increased percentage of economic development tools being used for historic preservation
- Historic preservation is proven conclusively and promoted as an economic engine
- Increased visitation statewide at historic sites

Each Trail Region should work to build relationships with economic development professionals serving in their region. That may include visiting economic developers to learn more about the marketable business assets in their community, as well as Trail Region executive directors educating the local economic developers about the cultural and heritage assets and attractions. More and more professional economic developers are realizing the impact of tourism as a critical component of the economic development success for their community, but it is important for the Trail Regions staff and board to clearly articulate the specific value of heritage tourism in the overall tourism product offering. Heritage tourism needs to become as top-of-mind an

economic impact element as other tourism types such as recreational, sports, nature tourism, film, or agritourism.

Experience proves that quality of life is a growing criterion in the economic development site selection industry. Business owners and leadership want to live in and employ people in communities where they feel welcome, safe, and interested, as well as profitable for their business. It's a profitability issue until two or more communities will suit their needs, and it then comes down to where one feels good about moving their family. The more the local economic development professionals know about the cultural assets in the region, the better job he or she can do selling the location as a quality of life choice.

An additional reason to help Trail Regions foster relationships with their local economic developers is because heritage tourism is a sales tax generator. In many communities, a portion of that sales tax funds the Economic Development Corporation (EDC,) which gets reinvested back into the community to help create and retain jobs, a Trail Region-benefiting cycle.

Partnering with other THC programs such as Texas Main Street, State Historic Sites, County Historical Commission Outreach, Museum Services, and Historic Courthouse Preservation will create new opportunities to help maximize exposure and usage of existing agency tools for preservation, economic development, and sustainability.

The HT Program should leverage the Texas Treasure Business Award (TTBA) which recognizes enduring businesses in the region for their extended local economic impact, some of which have long served heritage travelers. One way to do this is to search through the list of tourism related TTBA businesses over the years and develop short stories with photos or videos for the HT Program team to use to publicly celebrate them and for promotional purposes. Trail Region executive directors should know how to receive information on TTBA announcements and attend TTBA recognition events in their respective regions as schedules allow.

The Heritage Tourism staff should make efforts to develop strategies with these other divisions and programs to integrate their respective services more deeply into the Trail Regions, resulting in more robust inter-agency engagement throughout the communities.

## **Strategy 2: Learn and Experience History through Place**

Another goal from Texas' Statewide Historic Preservation Plan, "Learn and Experience History through Place" means that Texas residents and guests of all ages learn and experience the state's diverse history through formal education, recreation, and everyday interactions with historic places. Expected statewide outcomes include:

- 4th and 7th grade kids learn community/regional culturally inclusive history through place
- Adults within a community learn local history and value of preservation
- Increased visitation at historic sites statewide
- Increased participation of underrepresented people in historic preservation

Over the next several years, the HT Program staff can work with the Trail Regions and their partners to help expose more heritage travelers to what Texas has to offer. One way is to expand the Trail Region's awareness of school curricula related to Texas heritage and preservation. THC has a Youth Education Specialist providing this service. It would be advantageous if the Trail Region executive directors were to build relationships with this Program to help expand the THC's reach and interest in heritage tourism to children. The benefits are increased interest in heritage preservation and education as well as increased participation from curious students who may not come from a family of typical heritage travelers.

Reaching today's younger generations in the areas of Boy Scouts, Girl Scouts, Junior Achievement, history clubs, farming/agriculture clubs, arts clubs, school field trips, student councils, etc. are great ways to educate students about the heritage and cultural assets within their communities. This exposure can lead to fostering interest and affection for history and heritage. It is recommended that Heritage Tourism staff develop additional actionable strategies on reaching youth and share those ideas with the Trail Regions for implementation that is relevant to local groups and needs.

One suggestion from the planning workshops was for each Trail Region to record at least five brief video segments called "History in 5 Minutes" or "History in 10 Minutes." These would be brief videos of someone in the region telling the story of something that took place there that would be of interest to a heritage traveler. These snippets of stories could be posted on the Trail Regions' social media channels and websites as well as the Texas Time Travel website and THC social media channels in an effort to educate tourists. This could be a quick and inexpensive way to also support the "Learn and Explore History Through Place" goal within Texas' Statewide Historic Preservation Plan.

## **Strategy 3: Trail Regions to Participate in Next Statewide Historic Preservation Plan**

Texas' Statewide Historic Preservation Plan is typically refreshed and rewritten every ten years or so. As the current one expires year-end 2020, there is an opportunity for the Trail Regions to become engaged in the creation of the next one. The Trail Regions should become proactively involved in the public portions of developing the next version of Texas' Statewide Historic

Preservation Plan when the time arises. Their contributions to the next plan are valuable to help shape preservation efforts throughout Texas for the next decade.

## **Goal B: Create Opportunities for Information & Content Sharing**

### **Strategy 1: Resource Library Development**

In order to foster heritage preservation and education throughout the program, the THC should build and implement a rigorous education and professional development resource library for use by regional directors to help in providing hands-on assistance to their partners and stakeholders. The library should also include, but not be limited to idea sharing, template sharing, event ideas, travel itineraries and information sharing. Best practices, checklists, graphics, and other tools are shared, not just for uniformity, but for repurposing useful content and leveraging financial, human, and time resources and to foster education.

Uniform educational/workshop materials could be developed by expert professionals in each respective category, include current images and graphics from the Trail Regions, include speaker notes, and be enthusiastically delivered by staff or consultants skilled in the content.

### **Strategy 2: Create a Speakers' Bureau**

Another beneficial way HT Program staff and Trail Region executive directors can share information is by creating a Speakers' Bureau. A Speakers' Bureau is a collection of names, contact information, notes from past experiences/hirings, bio (if known,) fees (if known) are listed in a directory, sorted by subject matter or content specialty. This information should be housed in the Resource Library.

This is a tool by which stakeholders share speaker information with one another and for this type of organization, the list may include motivational speakers, keynote presenters, lunch and learn presenters, professional facilitators, and experts in preservation, tourism, culture, heritage, education, the arts, marketing, fundraising, etc. This list could also include local experts or docents who have expertise in explaining or demonstrating some element of history or heritage that multiple Trail Regions could benefit learning from.

### **Strategy 3: Trail Regions to Offer Workshops/Seminars**

Hosting workshops and seminars is a great way for each Trail Region to foster heritage preservation and education. New workshops can be created to add to existing events being produced or they can be new learning opportunities created as stand-alone seminars to provide stakeholders with educational training.

Some Trail Regions currently offer workshops and events to serve their members and other stakeholders, but each Trail Region needs to consider offering some type of regular event, whether it be an annual, semiannual, quarterly, or monthly. Each Trail Region should also consider providing occasional workshops from time-to-time as needed by those whom they serve. These workshops can be in-person or online in webinar form.

This effort should be spearheaded by each Trail Region individually or regions could choose to partner together. Each Trail Region should poll their constituents to determine what topics would be most beneficial and timely to benefit those constituents and their local communities, then make plans to develop and deliver such workshops. This may include the Trail Region executive director as the speaker, or it could be a speaker that the executive director secured to develop and deliver the presentation. This is an excellent yet simple value-added benefit each Trail Region could provide if they're not already.

Workshop ideas and possible speakers would be listed in the Speakers' Bureau earlier mentioned and housed in the Resource Library. Topic suggestions for workshops should be requested at various events throughout the year and be the first source to review when considering hosting a workshop.

### **Goal C: Provide Customer Experience Hospitality Training**

Although the Trail Region executive directors and boards have expertise in heritage tourism, travel, and customer service, it is beneficial for them to provide Customer Service Excellence workshops every 2-3 years for the Trail Region members and partners.

HT Program staff should ensure that the Hospitality Training Program provides an element of consistency in content topics and delivery, even if specifics may vary region to region.

### **Strategy 1: Trail Regions to Develop Hospitality Training**

New tips and techniques emerge from time to time and new stakeholders and ideas come onto the scene. It's responsible organizational management for the Trail Regions to provide periodic training on current customer service, visitor experience, tourism trends and best practices being used across the country. This type of training workshop can be developed by the Trail Region executive directors or they can hire a hospitality industry expert to build it.

### **Strategy 2: Trail Regions to Deliver Hospitality Training**

As a service, the Trail Regions should arm their boards and partners with the best and most current customer service and hospitality information. This type of training is likely best when each Trail Region customizes the delivery to suit each region's specific attractions, visitors, cultures, and needs. This workshop can be delivered by the Trail Region executive directors or they can hire a hospitality or human resources professional as the presenter.

### **Post-COVID-19 Considerations**

In a post-coronavirus environment, the HT Program and each Trail Region should be brainstorming topics and seeking feedback from community stakeholders regarding online trainings and/or webinars. Each Trail Region and the HT Program team should also establish a policy of meeting online via Zoom, TEAMS, GoToMeetings, or Skype to conduct regular or special called meetings when meeting in person is impossible or difficult.

The national travel restrictions have no doubt diminished the income and ability to operate for many hospitality-based businesses within each Trail Region. There will be restaurants, retailers,

and possibly lodging facilities or attractions that will be forced to close their doors permanently. Each Trail Region should be partnering closely with their own members, the area Chambers of Commerce, and Convention & Visitor Bureaus (CVBs)/Destination Marketing Organizations (DMOs) to offer advice and resource assistance to affected tourist attractions or businesses typically serving tourists, trying to help them weather the effects. For those businesses and/or partners that are unable to survive and for those whose hours may become limited, Trail Region executive directors must update their listings and materials to reflect the changes.

This is a unique opportunity for the Trail Region executive directors and their board members to reach out to partners and stakeholders to offer assistance and advice and to be a sounding board and brainstorm partner. It will be important for Trail Regions to take note of best practices during recovery and share those tips and tools with their regional stakeholders. It's an opportunity to shine as an essential resource with outstanding customer service skills, compassion, and hopeful optimism for the future of tourism. The same is true for HT Program staff reaching out to share best practices to the Trail Regions they serve.

## Strategic Priority #3: Encourage Regional Cooperation and Promotion of Heritage and Cultural Attractions

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*TO ENCOURAGE REGIONAL COOPERATION AND PROMOTION OF HERITAGE AND CULTURAL ATTRACTIONS, THE TEXAS HERITAGE TOURISM PROGRAM MUST ENSURE THAT THE TRAVELING PUBLIC CAN PARTICIPATE IN AN AUTHENTIC HERITAGE EXPERIENCE.*

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Promoting and supporting regional cooperation (in each Trail Region and among all the Trail Regions) by creating cohesive marketing opportunities to promote heritage and cultural attractions will leverage resources and maximize taxpayer investment.

### **Goal A: Develop Communications Plans**

Two Communications Plans need to be developed: one for the Trail Regions and one for the Heritage Tourism Program. Each plan should include the formal Style Guide developed by THC Communications Division.

Each of these two deliverables should be a comprehensive Communications Plan that addresses the heritage traveler as audience, unique selling propositions, desired objectives/calls to action, messaging development, tactics to target the avatars developed (see Strategic Priority #3,) media types, media outreach channels, determining relevant events, campaigns, and important dates in Texas history, developing a marketing calendar, and effectively measuring impact.

### **Strategy 1: Develop a Communications Plan for the Trail Regions**

A Communications Plan should be developed for the Texas Heritage Trails Program to give professional communications guidance to the Trail Regions. It can be designed as a mandate for certain THC and HT Program communication style and language usage dos and don'ts, and also serve as guidebook menu of ideas on creative communications tools Trail Regions can choose from to use in their local markets.

### **Strategy 2: Develop a Communications Plan for the Heritage Tourism Program**

A second Communications Plan should be developed for the Heritage Tourism Program to provide guidelines for the HT Program staff regarding official THC internal and external outreach. The HT Program Communications Plan should be more universal than the THTP one because the HP Program encompasses additional services. This plan should include all the elements listed above and communications strategies related to the inter-division relationship building the HT Program is wanting to facilitate. It should also include professional guidance on the elements listed regarding how to best build Strategic Alliances in Strategic Priority #4.

In the [THC Strategic Plan](#) under the Agency Operational Goal of Maximizing Quality and Effectiveness of Services, one of the Action Items is to “Create Agency Brand Identity Guidelines: Update and standardize guidelines and best practices for the THC agency brand, Texas Heritage Trail Region logos, Texas Time Travel design graphics, and state historic sites branding for staff and approved stakeholders to utilize for any communication project or need.” The Communications Division’s fulfillment of this Agency Goal could serve as the Heritage Tourism Communications Plan with a few minor HT Program specifics added; this strategy does not necessarily need to be the wholesale development of a separate or additional Communications Plan.

A few other possible actions the HT Program can take to streamline communications between themselves and the Trail Regions include:

- Restructuring the current monthly reporting tool into a more effective straightforward quarterly reporting tool; one simple tool to be used by every Trail Region
- Restructuring and templating the annual report required from each Trail Region
- Assisting the Trail Regions in transition of expectations; the HT Program staff should help Trail Region executive directors understand the new expectations and how to use the newly developed reporting tools, including software instruction when needed, i.e. Google Drive, Dropbox, Word, Excel, etc. These new sets of expectations should be revisited periodically once firmly established.
- Ensuring that the data they are asking the Trail Regions to track, record, research, collect, and provide is either required by statute to be collected or that it is used in-house to shape Heritage Tourism Program goal accomplishment or funding or programming decisions. Periodic internal self-audits on data collection vs. data value is healthy time and information management practice for any organization.

### **Strategy 3: Provide Professional Media Training**

A smart add-on would be to bring in a professional media instructor to briefly share tips with HT Program staff and Trail Region executive directors on how to present one’s best self on TV, radio, podcasts, photos, video, and newsprint. Many indicated they have never received formal training in this area. This could be an online workshop or an in-person training at one of the statewide semiannual joint meetings.

### **Strategy 4: Develop THTP Style Guide**

THC and Heritage Tourism and Heritage Trails brand standards must be established and required use by the Trail Regions. The Heritage Tourism team should request assistance from the THC Communications Division to specifically develop a Style Guide for use by Heritage Tourism and the Heritage Trails.

### **Strategy 5: Provide THTP Style Guide Training**

This type of THC and division branding should be taught by the THC Communications Division to both the HT Program team and the Trail Regions. This division has offered to help train Trail Region executive directors on proper logo usage, brand standards, styling, official color formulas, fonts, voice, product positioning, etc. to help create a uniform distinct identity across

the entire program. This training workshop is most efficient if all HT Program staff and Trail Region executive directors come to one location and the Communications Division can teach them all at once together.

The HT Program team should observe the new Communications standards and should expect the Trail Regions to adhere as well.

### **Strategy 6: Trail Regions to Utilize and Adhere to Style Guide**

Each Trail Region should have access to a Style Guide developed by the THC Communications Division specifically for the Heritage Trails brand and begin to adapt marketing standards to match those of the HT Program. Not every single item produced has to be uniform, but there must be a consistency in look, feel, and voice in the marketing that the Trail Regions produce to be identified as a THTP partner. A visitor traveling from one region of the state to another should be able to recognize a familiarity in messaging.

### **Strategy 7: Provide Marketing Training Workshops**

Each of the Trail Regions have their own marketing tools and philosophies, and while individuality is necessary, there is opportunity for more on-brand marketing, especially when promoting heritage and cultural attractions with their local partners. Marketing tools, tips, and tricks can also be taught in group workshop form by the THC Communications Division or a private sector marketing professional to the Trail Region executive directors to help them best leverage the taxpayer dollars they receive from THC combined with partner or other self-generated revenue.

HT Program staff should query the Trail Regions to determine what the specific marketing needs are and then bring in the appropriate professional to best assist them. This type of training might involve:

- the mechanics of compelling storytelling
- collateral development
- target marketing
- cooperative advertising
- newsletter tips, etc.
- videos recorded to share with members or partners of the Trail Regions to leverage promotional dollars

### **Strategy 8: Collaborate in the Development of Marketing Materials**

Marketing material/collateral development must be a tighter collaborative effort between the Trail Regions, the HT Program staff and the Communications Division. Both the THC and the Trail Regions each already develop marketing materials, but not in as a collaborative environment as preferred. Each entity has something to contribute to making most marketing pieces more valuable. Not that every document produced must be subject to approval; just that they should use each other's knowledge more frequently. Such expectations can be outlined in future contractual agreements if need be.

In the 2020 joint strategic planning session, the Trail Regions agreed to send various pieces of content they have developed to the Communications Division (via the HT Program staff) for repurposing into other forms of content and for the communications professionals to edit or polish up items for distribution. It will be the Trail Regions that are responsible for initiating such a collaborative.

### **Strategy 9: Design and Implement a Social Media Usage Guide**

HT Program staff should engage the assistance of THC Communications Division to develop a Social Media Usage Guide for the HT Program and each Trail Region to use. This guide should be distributed to each Trail Region with the expectation they will use those guidelines in consistent fashions to promote heritage and cultural attractions and events in their regions. The HT Program should also use those Communications Division guidelines when promoting heritage tourism from THC accounts to ensure uniformity of messaging and maximizing paid, un-paid, and earned exposure. The HT Program could also contract this service out and have the Communications Division approve it before implementation.

### **Strategy 10: Develop and Deliver a Social Media Workshop**

The HT Program should create and deliver a Social Media Workshop to educate each Trail Region executive director on how to effectively promote their heritage and cultural attractions through common social media channels such as Facebook and Instagram. A quick review on Instagram reveals that not every Trail Region has an account and some of those who do, do not use it regularly or effectively, or have ever used it at all. This is a relatively simple skill to teach and the HT Program staff should require regular promotional social media posts as part of the contractual expectations.

THC is promoting heritage attractions across Texas and is funding each Trail Region to promote attractions, so it is a reasonable expectation that each Trail Region should be responsible for this type of modern promotion to travelers. The training should include hands-on assistance in creating accounts where none exist, dos and don'ts of creating posts, commenting, proper and improper use of hashtags, and sharing. This workshop should also contain tips for still photographs, video postings, posting multi-photo sets, and soliciting local photos from local amateur and professional photographers as well as reposts of visitor photos of attractions in the Trail Region. Equipping the Trail Region executive directors with these tools will help them promote their region and develop regional cooperation to attract visitors.

**Strategy 11: Ensure New Website Fully Showcases Heritage Assets**

The THC is currently in the updating phase of the Texas Time Travel website. Ensure that the finished product, once delivered, includes intuitive functionality, ease of use, ease of maintenance, and the ability to drive more traffic to it. The new website should clearly and accurately showcase all heritage and cultural attractions that meet Heritage Tourism Site Standards (see Appendix B) within each of the Trail Regions.

**Strategy 12: Trail Regions to Appear as Podcast Guests**

It is recommended that the Trail Regions staff explore relevant local, regional, or national podcasts they are interested in and pursue opportunities to appear as guests. It's a unique opportunity to share their own heritage tourism expertise and showcase their respective regions to a multitude of listeners, while leveraging their recent media training mentioned earlier. It's a chance to creatively market their heritage and cultural attractions at no cost.

**Strategy 13: THC to Explore Creating a Podcast in the Future**

At the joint strategic planning session in preparation for this plan development, several participants raised an inquiry regarding the possibility of the THC creating a podcast series within the next five years. Although no plans are in works now to start a podcast, it is recommended that the HT Program team at least explore with THC Communications what is involved in creating, maintaining, and promoting a state agency podcast to determine if it is feasible and effective.

**Goal B: Provide Technical Assistance to the Trail Regions**

**Strategy 1: Provide Email Assistance**

In conversations with participants in the joint strategic planning session, there was discussion about the ten Trail Regions using different email providers, different server host companies, and different email signatures. The Trail Regions should be expected to adhere to current and appropriate email specifications for the sake of recognizability, consistent branding, and use of their own logo.

There was also discussion regarding group efficiency software tools. Some Trail Regions expressed an interest in exploring and comparing project management and team communications software tools, i.e. Trello, Slack, Basecamp, etc. This is an area where HT Program staff and/or Communications Division staff may be able to offer advice.

The THC Communications Division offered to help the Trail Regions and the HT Program team streamline any necessary services as well as educate users on any software usage expectations. It is anticipated that some of the email inconsistencies across the Trail Regions may get resolved through the new website installation, but if not, the Trail Regions may need the further assistance of the Communications Division.

### **Strategy 2: Provide Newsletter Assistance**

Each Trail Region prefers different newsletter subscription services to send out their e-newsletters. The THC Communications/Information Technology team offered to help the Trail Regions and HT Program staff streamline any necessary services as well as educate users on maximizing the tools within their chosen software packages. Trail Region newsletters should also be appropriately branded using the THTP Style Guide.

### **Goal C: Maximize State Fair of Texas Booth Benefits**

It is time for some refinement of rules and expectations around the State Fair of Texas exhibit booth. The HT Program provides the booth and the Trail Regions manage the installation and work the booth each year. Some elements of exhibiting in the shared space work very well and others need some updating and clarification.

### **Strategy 1: Standardize State Fair of Texas Booth Participation to Leverage Value**

In order to maximize the value of the State Fair of Texas booth opportunity, it is recommended that an ad hoc committee be created to refine parameters of participation and to standardize expectations. This committee should be created by the Trail Region executive directors and consist of Trail Region executive directors, HT Program staff, and Communications staff as committee members craft or update the following:

- State Fair of Texas Standard Operating Procedures manual
- Distinct preparedness, behavior, dress expectations
- Financial and booth time expectations
- Any additional facilities setup or breakdown protocols
- A Frequently Asked Questions (FAQ) document
- Discussions about the possibility of THC assisting with additional funding to secure a larger booth space
- Discussions about the possibility of THC assisting with creativity and development of the booth
- Consistent branding of the Texas Heritage Trail Program at the State Fair of Texas
- Assistance with developing photo/selfie opportunities and visual appeal to booth visitors
- Consider sharing the collected emails (through giveaways or just sign-up sheets)
- Expand email marketing and list building efforts – consider sharing lists between Trail Regions
- Ensure equitable representation

This ad hoc committee can dissolve after these elements have been developed and implemented.

### **Goal D: Develop Detailed Visitor Avatars/Personas**

It became clear in the listening sessions throughout each of the ten Trail Regions that there is a need for improved awareness for executive directors and board members of exactly who are their target market travelers. There is no cookie-cutter one-size-fits-all tourist for the entire state.

#### **Strategy 1: Heritage Tourism Program Staff to Conduct Statewide and National Research**

The HT Program staff should invest in developing consumer research that will help build a picture of a statewide heritage tourist persona or avatar. This research should be used to guide all educational outreach and marketing efforts for the HT Program and the THTP. This “umbrella” persona can then be further developed into a more specific persona by each Trail Region to customize outreach and marketing efforts produced regionally.

#### **Strategy 2: Trail Regions to Conduct Local and Regional Research**

Experience proves that once an organization clearly defines its ideal audience, it is much better equipped to make accurate assumptions about things that will appeal to that traveler and how to position local and regional experiences tailored to their respective interests. It will be the responsibility of each Trail Region to begin collecting data to further analyze current travel patterns.

Data collected by tourism organizations often includes:

- zip code data from their attractions
- zip code data from hotels and other lodging facilities
- zip code data from local Chambers of Commerce
- zip code data from local CVBs/DMOs
- license plate or drivers’ license data
- demographics of followers/fans on social media channels
- online surveys of visitors
- in-person surveys collected at events
- spending habits evaluated after events occur

Although research data can be acquired based on behaviors, movements, and information shared by past and current travelers to each Trail Region, much of this type of research is merely probing and asking the regional experts for detailed descriptions of their ideal heritage traveler.

This will result in a more detailed and customized regional visitor persona. This data should be used for the Trail Regions’ own regional marketing purposes and be submitted to HT Program staff quarterly so that agency staff can begin building more accurate information for their facilitated workshop sessions. This data analysis could also be shared with Trail Region partners as a member service. Every stakeholder, from the local attraction to the agency, benefits when traveler research is conducted.

### **Strategy 3: Use Research to Develop Marketing Strategies**

It is recommended that the HT Program develop a facilitated session onsite with each Trail Region within the first two years of this plan to help each organization determine from their local and regional research efforts who their ideal traveler is (may be 2-5 avatars.) Together, the HT Program staff and each Trail Region board can clearly articulate descriptions and buying habits of each avatar/persona.

Such avatars typically include, but are not limited to:

- age
- gender
- household income
- interests
- home zip codes
- shopping habits
- vehicle preferences
- typical vacation spots
- travel budgets
- food and restaurant preferences
- lodging preferences
- activities and events enjoyed
- books/magazines/reading preferences
- social media preferences

At the end of the workshop, the Trail Regions should be able to implement targeting these avatars into practice for their marketing plans.

### **Goal E: Provide Robust Marketing Assistance to the Trail Regions**

#### **Strategy 1: Provide Cooperative Advertising/Marketing Consulting Assistance**

Many of the cooperative advertising and marketing relationships work well, but some may need some revamping. Since it's difficult for the HT Program staff to fully know which cooperative advertising relationships are ideal and which need improvements, it is recommended that the HT Program require each Trail Region to share with them feedback on the cooperative advertising they provide to partners and the HT Program to give professional guidance to improving any elements of that marketing alliance. This can also make for a valuable discussion topic at the THTP statewide semiannual meeting or during site visits made by HT Program staff to the Trail Regions. There are always opportunities for improvement and sharing of best practices to raise the promotion effectiveness and maximize taxpayer investment.

#### **Strategy 2: Encourage Trail Regions to Participate in Travel Shows/Trade Shows**

It is recommended that the HT Program staff encourage Trail Regions to participate in applicable travel and trade shows. Participation may involve having a booth or merely attending and working a show floor. This is an excellent way for the Trail Regions to have direct communication with their exact markets –heritage tourists and heritage stakeholders. This can become even more customized once the traveler personas are fully developed in each Trail Region; it will become more evident which Trail Regions should attend/exhibit at which shows to reach their ideal traveler.

**Goal F: Increase Real Places Conference Engagement Among Trail Regions**

HT Program staff and the Trail Regions should brainstorm each year on what topics are most relevant to develop and present at the Real Places Conference based on heritage tourism trends, economic recovery, hospitality industry advocacy, and what is currently going on in the Trail Regions. Basing educational offerings upon current needs is always on-point for conference content development that delivers on participant expectations.

**Strategy 1: Trail Regions to Help Generate Content/Speakers for Real Places**

It is recommended that HT Program staff encourage Trail Regions (staff or subject matter expert board members) to submit proposals to conduct sessions at Real Places. Trail Regions should also be helping HT Program staff develop relevant topic ideas and helping secure speakers for the event. It's a great way for each Trail Region to showcase its relevance on a statewide and inter-agency audience scale. This can also raise the profile of individual Trail Regions in the eyes of THC Commissioners and local elected officials.

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## Strategic Priority #4: Foster Effective Local Tourism Leadership and Organizational Skills

The HT Program needs to ensure the work plans of each Trail Region directly align to the HT Program Strategic Plan and the THC's mission, values, and goals to ensure organizational integrity and intended use of taxpayer funds, as noted in the Texas Sunset Advisory Commission findings of January 2019.

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*TO FOSTER EFFECTIVE LOCAL TOURISM LEADERSHIP AND ORGANIZATIONAL SKILLS, THE HERITAGE TOURISM PROGRAM AND THE TRAIL REGIONS MUST INCLUDE ACTIVITIES DEVELOPED TO BUILD LEADERSHIP AND ORGANIZATIONAL CAPACITY AT BOTH THE STATE AND REGIONAL LEVELS, RESPECTIVELY.*

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### Goal A: HT Program Staff to Increase Frequency of Field Visits

It is recommended that the HT Program staff get into the field more often to visit the Trail Region executive directors and sometimes their boards. As the many changes recommended in this Strategic Plan take effect, it is evident that more hands-on customer service and relationship building will be necessary to ensure success. These visits can include one-on-one assistance with anything the executive director expresses needing help with, or they may include a workshop delivered by a HT Program team member at the Trail Region board meeting. The HT Program staff is the Trail Region's most valuable partner and partners require working time together.

### Goal B: Trail Region Boards to Increase Frequency of Field Trips

It is highly recommended that each Trail Region to periodically take their board members on field trips around the region to visit historic sites, attractions, courthouses, cemeteries, etc. and to stop in to meet the local Main Street Directors, Chamber of Commerce folks, and CVB/DMO staff. The purpose of field trip visits is to learn effective tactics other sites and communities are using and how they work, as well as to better understand history and heritage from a regional standpoint.

Visits do not have to be limited to just other communities within their region. Trail Regions have expressed an interest in learning more about Texas history and heritage within the other Trail Regions across the state. Trail Region boards should plan visits to other Trail Regions as time and budgets allow. This type of cross-region awareness can lead to creative opportunities for cross-region collaboration, marketing, and promotion.

This expectation can even be tied to the new quarterly reporting tool to be developed.

### **Goal C: Provide Increased THC Commission Information to Trail Regions**

Many participants in the joint strategic planning session expressed an interest in learning more about the Texas Historical Commission's meetings and decisions. There was feedback that they aren't fully aware of the Commission's ideas, decisions, and interests other than the Texas Heritage Trail Program's continued support from the THC Commissioners. The executive directors and Trail Region board chairs indicated they are interested in each receiving the published minutes or a video link (unlisted YouTube link) to recorded THC Commission meetings to gain a better understanding of the Heritage Tourism Program and the Texas Heritage Trails Program within the entire THC structure.

### **Goal D: Modify the Existing THTP Statewide Semiannual Joint Meeting Format**

It is recommended that the joint THTP statewide meeting that occurs twice a year with each Trail Region executive director, board chair, HT Program staff, and THC leadership be modified into a new format. The exact format should be created from the participants sharing their ideas of what that should look and feel like. Suggestions at the joint strategic planning session included:

- a day-long brainstorming session
- sharing of new ideas or best practices used recently or seen elsewhere
- sharing of work plan implementation strategies that have been successful
- "60 ideas in 60 minutes" format
- topical discussions based on current trends/concerns

Any or all of these formats could be tried over time. Not all meetings are necessarily required to be in Central Texas/Austin.

### **Goal E: Establish and Nurture Strategic Alliances**

In order to foster effective local tourism leadership, the HT Program and Trail Regions must seek to establish and nurture alliances with a variety of strategic partners within the state structure and within the local and regional structure.

Strategic alliances will remain important to gather and maintain accurate inventory lists of cultural and heritage attractions and hospitality assets. These must be conducted with even higher levels of sensitivity and respect in the post-coronavirus environment where some will have likely had to close, file bankruptcy, or operate with fewer hours or staff. See more COVID-19 considerations under Strategic Priority #2.

Continual identification of internal and external partners and developing sustained strategic alliances will ensure the continued success of the program and its affiliate organizations.

### **Strategy 1: Partner with Texas State Agencies and THC Divisions and Programs**

Potential partnerships to explore establishing or growing include:

- Texas Parks and Wildlife Department
- Texas Department of Transportation
- Texas Commission on the Arts
- Texas Department of Agriculture
- Office of the Governor, Economic Development and Tourism
- Other THC Divisions, Departments, and Programs such as:
  - Communications Division
  - Texas Main Street Program
  - Education and Outreach Program
  - Historic Sites Division
  - Museum Services Program
  - Texas Historic Courthouse Preservation Program
  - Texas Historic Roads and Highways Program

Many of these programs participated in the inter-agency listening session conducted in preparation for this plan and offered to present to the Trail Region executive directors on their products and services, and to establish working relationships with them. THC programs support the success of the THTP and are willing to consult and collaborate as their expertise allows. They realize that inter-agency success depends on inter-agency collaboration. In turn, they requested that they be kept informed quarterly with an update from the HT Program of what is going on in the Trail Regions so they can look for ways to plug in and assist, as well as assess what impact their division's contributions are having to the overall Program enhancement.

For instance, the Communications Division offered to assist the HT Program and the Trail Regions in developing Communications Plans (see Strategic Priority #3 for the strategies.) They should accept those type of outreach offers and work the Communications Division to leverage those skills. The THC must support and foster this relationship building between the Trail Regions and other THC divisions to leverage assets and resources, and to help fulfill its preservation mission.

### **Strategy 2: Partner with the Friends of the THC**

The Friends of the Texas Historical Commission (FTHC) has expressed a willingness to work with the Trail Region executive directors to teach fundraising methods and industry best practices in a centralized workshop. This is a skill set this team is extremely experienced or well-versed in and is a proficiency that many Trail Region executive directors have expressed an interest in developing. This effort will help teach each Trail Region how to raise money outside the funding they receive from the THC. The HT Program will benefit from providing the Trail Region leadership such education because when the Trail Regions become more successful at revenue generation, they will have more opportunity to fund their efforts, providing even greater value to their members and stakeholders.

The HT Program team should work with the FTHC to organize a series of training sessions to be provided to the Trail Regions as a part of the THTP statewide semiannual meetings. In addition to formal training in the areas of fundraising, friendraising, and financial sustainability, this also provides an opportunity for Trail Region executive directors to engage with FTHC for assistance with individual needs. It is beneficial for the Trail Regions that they establish and sustain a working relationship with FTHC.

**Strategy 3: Each Trail Region to Better Engage with Historic Sites**

Another method that at least one Trail Region already uses to keep THC Historic Sites engaged with the region is to create ex-officio positions on their board and invite the regional site manager(s) in their area to serve in that role. That naturally allows for mutual sharing of information at the board level, but that certainly filters down into better conversations about THTP collaboration when regional site managers get together, and vice versa. It also formalizes the relationships with the sites. Extending this relationship to all or multiple Trail Regions will require a conversation between HT Program staff and the Historic Sites Division regarding approval of board service invitations, but the idea is mutually beneficial for all parties.

**Strategy 4: HT Program to Provide Workshops for Trail Regions on Other THC Divisions/Programs**

Interest has been indicated by Trail Regions to learn more in these areas in this order:

- Historic Sites
- Texas Main Street Program
- Museum Services
- Texas Historic Highways
- Friends of the THC
- Historic Preservation Tax Credit Program
- County Historical Commission Outreach
- National Register of Historic Places
- Historical Marker Program
- Certified Local Government

**Strategy 5: Enhance Strategic Alliances by Fostering Communications Networks**

It will be important for the HT Program staff to monitor and help foster the various communications networks that will need to become more robust. The board members of the Trail Regions specifically requested greater communications directly to them. It will be the responsibility of the HT Program staff to determine which communications warrant board inclusion vs. those that do not. The HT Program staff must pay close attention to fostering the communications between the following groups:

- Between THC Other-Divisions/Department staff and Trail Region Executive Directors
- Between THC Other-Divisions/Department staff and Trail Boards of Directors
- With Commissioners & Legislators to promote continued funding

Naturally, it is upper management at THC that communicates with Commission members and legislators most directly, but the HT Program staff can play a role in making sure management has the best information, tools, and regional success stories to help them tell the most compelling achievements about and within the program.

All communications will be expected to be professional in nature and consistency, high quality, and accuracy will be required at all times. It must be remembered that all communications are subject to the Open Records Act and written communications such as memos, text messages, and emails can be requested by the public at any time for review or publication. High standards require high expectations.

### **Goal F: Enhance Trail Region Board Member Effectiveness and Engagement**

There are several opportunities for the HT Program to provide the Trail Regions with education, resources, and tools to maximize their contributions to board service.

#### **Strategy 1: HT Program to Provide Workshops on Interested Topics for Trail Regions' Boards and Executive Directors**

Interest has been indicated by Trail Regions in these areas in this order:

- Board development training (see Strategy 2 below)
- Effective marketing
- Non-profit education (finance, policies, board recruitment, strategic planning, grants)
- Leadership development
- Social media strategy development
- Latest technology trends, tips, and tools
- Product/experience development

#### **Strategy 2: Equip Trail Region Boards with Tools and Templates**

There are three steps to effective board member effectiveness and engagement:

1. Commitment Form/Job Description
2. Onboarding System
3. Board Development

The following documents and processes are necessary for the THC to provide to the Trail Regions, including training on how to implement and use the new tools. The structure being recommended in the Strategic Plan is that each Trail Region have that 3-Step Approach to Board Member Effectiveness and Engagement:

The specific documents included (but not limited to) are in these 3-Step categories:

1. Commitment Form (job description for all potential board members considering service)
2. Onboarding (one-time one-on-one meeting between executive director and new board member(s) to orient them to their new organization, usually 1-2 hours)
3. Board Development (annual refresher for all board members regarding roles, governance, engagement, best practices, review of current plan, etc., usually 3-4 hours prior to their annual strategic planning workshop)

Documents for a template for each of these three stages of board engagement is needed:

1. Commitment/Accountability Form: A commitment form template that includes the position description requirements and expectations of all board members. The purpose is to completely inform all potential board members prior to their nomination so they fully understand what is expected of their performance should they be invited to serve.
2. Onboarding: This deliverable will contain many documents including:
  - a. Confidentiality Form
  - b. Conflicts of Interest Form
  - c. Code of Conduct Form
  - d. Sample Bylaws
  - e. A checklist of things that the ED needs to share, distribute, or explain to the new board member(s.)
3. Board Development: The third deliverable will include:
  - a. A checklist of what goes in each board member notebook prior to the workshop
  - b. A customized Board Development PowerPoint template including speaker notes
  - c. Committee structures and organizational management
  - d. Roberts Rules of Order
  - e. Sample monthly agenda for board meetings
  - f. Board matrix for filling expired terms/vacancies

Equipping the Trail Region executive directors and their board members with the tools they need to succeed and govern effectively will enhance the quality of the entire Texas Heritage Trails Program as well as elevate the prestige of board service.

### **Goal H: Research and Consider Modern Philanthropic Tools**

There are innovative modern tools that nonprofits across the country utilize to effectively build long-term financial sustainability. These are in addition to the foundation grants mentioned in Strategic Priority #1.

### **Strategy 1: Trail Regions to Research Legacy Giving Programs**

Creating a Legacy Giving Program is an ideal strategy for Trail Regions to consider exploring over the next few years. It is a tool that many nonprofits use as an option to substantially grow the financial strength and sustainability of their nonprofit over time. A Legacy Giving Program is a way for anyone anywhere to contribute to any nonprofit posthumously.

If any Trail Region were to add this option to their fundraising tools and be willing to share their template, any other Trail Region could insert their own logo, name, and use it for the future benefit of their nonprofit should they choose to exercise this option to grow their funding. Many legacy giving programs also allow the donor to make the donation in “honor of” or “memory of” as well as their own name as benefactor. Potential contributors could include former Trail Region board members, former elected officials, local philanthropic families, local art collectors, and other heritage and cultural stakeholders.

It's impossible to tell who in a community might be willing to make a financial contribute after death to a cause they support unless they are made aware of the option to give that way while still alive.

**Strategy 2: Leverage Giving Tuesday**

All Trail Region stakeholders should still be encouraged to give financially to the Trail Region annually on National Giving Tuesday beginning with November 2020. The THC Communications Division can design a tasteful holiday ad to post and/or run for the benefit of each Trail Region.

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## KEYS TO SUCCESSFUL PLAN IMPLEMENTATION

### Key 1: Ensure a Culture Shift

Crafting a new culture in any organization or relationship can be challenging to do, but well worth the effort once that new culture is firmly established and embedded in execution over time. It can be an exciting fresh start to implementing new goals and strategies. It will be the responsibility of both the Heritage Tourism Program team and each Trail Region to work together to shape an enhanced culture.

When trying to shape a new culture, there are several collective mindset shifts that should occur. A few of them are listed here:

- Becoming a solutions broker
- New Beginnings (only looking forward)
- “Us” & “Us” teamwork
- Positivity and optimism
- Customer experience excellence
- Collaborative environment
- Clarity in mutual expectations
- Embracing change and new ideas

The Trail Regions and the HT Program team must position themselves as elements to augment the success of the entire program. Having a mindset of serving others and helping others develop and perform at their highest levels is healthy for any team working together. Everyone involved should see themselves as eager service providers and skilled solutions brokers, the people that stakeholders can turn to help find solutions to their challenges. The Trail Regions and HT Program staff should have the understanding and confidence that each are there to help one another achieve success. There must be universal application of a willingness to embrace new ideas and shape a new culture.

A new culture also includes resisting the human tendency to look to the past to understand or explain how things used to be, or why things were done a certain way, or why certain expectations weren't understood or met....frankly, anything that looks backward. It is not about “us” and “them”; it is about “us” and “us.” Fresh beginnings are about looking to the future with hope and optimism and positive curiosity. There should be a sense established that it is, indeed, a new day in the Texas Heritage Tourism Program, and that everyone involved as a team of agency staff and nonprofit staff and volunteers are jointly focused on one Vision and four Strategic Priorities.

Customer Experience Excellence is the new standard in heritage tourism. Nothing less. HT Program staff will be committed to providing the highest levels of customer service and the Trail Regions will be committed to providing the highest levels of customer service. There must be a clarity in mutual expectations for performance, and a commitment to rectify any ambiguities

anywhere along the way. A new environment of collaboration, mutual respect, and a healthy understanding that interdependence is necessary for success should be embraced by everyone.

This new culture will be even more significant and necessary in a post-COVID-19 economy. Economic recovery in the heritage tourism industry is going to require aggressive innovation, solicitation of creative solutions, and continuous feedback loops.

### **Key 2: Develop Standard Operating Procedures**

It is reasonable to expect that each Trail Region will develop a Standard Operating Procedures Manual outlining how things operate in their nonprofit within the next 12 months. A template can be created or curated by the HT Program staff and shared with each Trail Region for populating it based on their own procedures.

This does not need to be a huge labor-intensive or voluminous document; the purpose is to give future Trail Region executive directors a reasonable guidebook to follow in the event the current executive director was to leave the post or unexpectedly unable to share their experiences and advice to anyone filling in. Preparedness is good organizational management.

### **Key 3: Organizational and Resource Alignment**

To ensure intended use of taxpayer funding, certain elements of operation of the Trail Regions must be contractually tied to their funding. This must begin with a renewed strategic alliance between the THC and the nonprofit Trail Regions including performance-based contracts as noted by the Texas Sunset Advisory Commission findings of January 2019. Funding should be released when reasonable expectations are fulfilled, such as:

- Trail Region Scopes of Work annual goals match the THC Heritage Tourism Program's 5-Year Strategic Plan goals
- Quarterly Reporting Tool complete, accurate, and submitted on time
- Annual Report submitted on time using provided template that highlights each Trail Region's successes and progress toward its own goals and the four HT Program strategic priorities.
- Social media channels and hashtags used as advised to promote brand awareness
- Demonstrated proper use of Marketing Materials standards and styles

While the Strategic Priorities set the tone for the entire HT Program and the Trail Regions, matching Trail Region goals to HT Program goals does not mean that those goals are the only goals a Trail Region can establish. Trail Regions should add other items they plan to accomplish into their individual Scopes of Work and develop their own strategies on how to help fulfill program goals.

Trail Region executive directors and boards should review the HT Program goals regularly and align their goals within a similar framework to help the overall program goals be accomplished. This type of accountability and continuity is especially attractive to the THC Commissioners and legislators for future funding support because the HT Program goals directly align with the Texas Administrative Code.

## CONCLUSION

These 2020-2025 goals and strategies are about creating and implementing streamlined processes and systems and raising the quality of services provided.

These four Strategic Priority streamlined process improvements and systems integration will take significant time and effort to fully implement, but they will generate countless efficiencies, leverage taxpayer investment, and create more time for meaningful execution of the Heritage Tourism Program and the Texas Heritage Trail Program mission.

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## **APPENDIX A: KEY PERFORMANCE INDICATORS**

The metrics for measuring the efficacy of the goals and strategies in this plan are still being developed. Some of the Key Performance Indicators (KPIs) are dependent upon stipulations in the Texas Heritage Trail Regions' contracts. These contracts are currently being drafted by the Office of the Attorney General.

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## **APPENDIX B: STANDARDS FOR POINT OF INTEREST LISTINGS IN TEXAS TIME TRAVEL**

This document provides required and preferred standards for a point of interest to be included in TexasTimeTravel.com to ensure that the traveling public has a quality experience when visiting. These standards will be used as a program tool by both the HT Program staff and the Trail Regions to enhance the heritage visitor experience throughout Texas, both in person and online.

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