

## APPENDIX A

# THE PLANNING PROCESS

In 2011, preliminary planning for work on the management plan for Freedom's Way began with development of mission and vision statements by the Freedom's Way Heritage Association's Board of Directors. In the fall of 2012, information was collected from various sources to create an initial inventory of natural, historic, and cultural resources within the heritage area, which was compiled into a summary report and database (Brown Walker 2012).

In the spring of 2013, the Association conducted a series of three public workshops with assistance from the planning firm Vanasse Hangen Brustlin, Inc. (VHB) to gather input on the upcoming management plan. During the summer of 2013, VHB also compiled an extensive GIS database of inventory information within the heritage area from state and regional sources. The Brown Walker report and VHB GIS database comprise the inventory information required for the management plan.

An Interim Executive Director was hired for Freedom's Way in August 2013 to oversee the management plan process. An online survey of potential partners was conducted in September to obtain information on organizational interests and priorities. Seventy-eight potential local and regional partners participated. In January 2014, the planning firm Heritage Strategies, LLC was retained to assist in preparation of the plan.

A review of existing conditions within Freedom's Way was undertaken by the planning team between January and April 2014. The review included conversations with individuals involved with the heritage area, review of inventory and background information, field work, and online research. Information on potential state and regional partners was collected and initial contacts were made by phone and email.

In mid-January, initial meetings were held with the Freedom's Way Board of Directors and the Steering Committee for the management plan. Interviews were conducted with a variety of individuals familiar with the heritage area and the region, and a workshop was held with regional historians, educators and, interpreters.

In late March, a series of five focus groups were conducted on the topics of land conservation, historic preservation, community planning, history and interpretation, and heritage tourism. For each topic, representatives of appropriate potential state, regional, and local partners were invited to attend to discuss existing conditions; the heritage area initiative; and the activities, interests, and capabilities of their own organizations. These and subsequent workshops were a preliminary means through which potential partners were identified and engaged in the planning process. Follow-up meetings and discussions were held with key partners as appropriate.

Regular workshops were also conducted with the Freedom's Way Board and Steering Committee. In conjunction with the focus group sessions noted above, a vision session was held with Board members at which the planning team reviewed their findings relative to existing conditions. The heritage area's mission and vision statements were discussed.

In mid-May, a Board retreat was held to review the roles, responsibilities, and best practices of a non-profit broad. The retreat was led by a representative of The Non-Profit Center at LaSalle University's School of Business and resulted in a memorandum on observations, recommendations, and assigned actions for moving forward (Greenberg 2014).

In early May the planning team submitted a draft Summary of Existing Context for the heritage area which reviewed the team's findings and existing conditions on the topics of geography and landscape, community

organization and governance, demographics, community planning, historic preservation, interpretation and heritage tourism, education, conservation and open space, agriculture, and arts and culture.

The Summary characterized the region's dynamics and provided background information for the development of initial strategies and recommendations. The Summary was reviewed by members of the Steering Committee and revised in early June. It is included in the management plan as **Appendix C**.

Also in mid-June, the planning team presented their initial Outline of Recommendations for the management plan. The Outline included revised mission and vision statements, goal statements, and strategies and recommendations around the following topics:

- Management and Implementation – A Business Plan for the Heritage Area
- Telling the Heritage Area's Stories – Interpretation and Heritage Tourism
- Engaging Residents and Youth – Education and Research
- Stewards of Our Landscape – Conservation Initiatives
- Preserving Our History – Historic Preservation
- Planning for Our Communities – Enhancing Quality of Life
- Strengthening Our Agricultural Traditions – Farming and Local Foods

Workshops on the Outline of Recommendations were held in late June with the Steering Committee and Board. In late July, focus groups with potential partners were reconvened to discuss the recommendations, combining the original five focus groups into three: historic preservation and community planning, land conservation, and interpretation and heritage tourism.

In August, an outline for the management plan was prepared, reviewed by the Steering Committee, and revised. Outlines for the interpretive and management chapters were also prepared for review. Changes were made to the outline based upon input received, including combining of several of the chapters whose topics were related.

Among the plan's early actions, programmatic agreements were developed with several key partners, joint programs were conducted, and funding support was provided for a number of partner initiatives. Joint programs included an oral history project with the Nashua River Watershed Association; a series of trail events with the Montachusett Regional Trails Coalition; and research, scholarship, and training on stories of Revolutionary War history with local communities in continuation of the heritage area's Patriot's Paths initiative in partnership with the Massachusetts Society of the Cincinnati.

Draft chapters of the plan were produced in September through November and submitted to the Steering Committee for review on a rolling basis. Chapters were reviewed by staff, board members, and partners familiar with the topics they addressed. A workshop on interpretive themes was conducted in late October. Comments for several of the chapters were provided to the planning team and revisions were made to those chapters.

In December 2014 through February 2015, Freedom's Way staff and colleagues undertook a comprehensive review of the draft chapters. Chapters were reorganized and reordered, and significant details and content were addressed. Heritage area themes were reconsidered and further developed in accordance with advice received from the National Park Service. The planning team reworked chapters based upon the direction received, and Freedom's Way staff reworked and further developed several chapters.

A Draft Management Plan was completed in early March and submitted to the National Park Service for review for consistency with the heritage area's enabling legislation. Revisions were made as suggested. Shortly thereafter, a series of forums were held with partners throughout the heritage area to review strategies and recommendations. Upon completing final revisions, the Management Plan was submitted to the Secretary of the Interior for approval.