



**SHENANDOAH
VALLEY
BATTLEFIELDS**

National Historic District

VIRGINIA



**IMPLEMENTATION
PLAN**



IMPLEMENTATION PLAN

A SUPPLEMENT TO THE

MANAGEMENT PLAN

FOR THE

SHENANDOAH VALLEY BATTLEFIELDS

NATIONAL HISTORIC DISTRICT

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CHAPTER I

INTRODUCTION AND PURPOSE

I.1 INTRODUCTION

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CHAPTER I

INTRODUCTION AND PURPOSE

I.1 INTRODUCTION

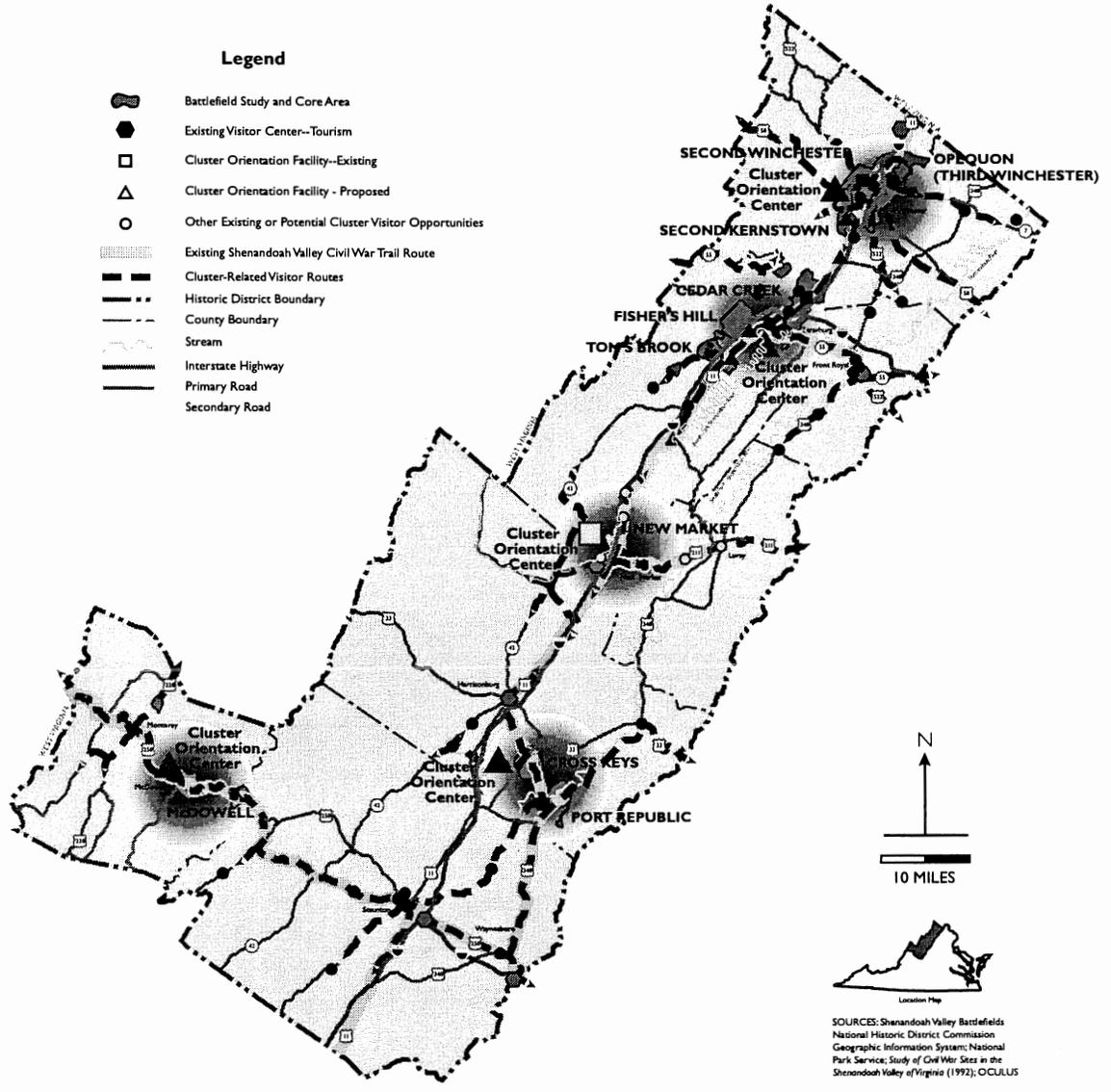
This Implementation Plan was prepared to supplement and amplify the “clusters” approach and other actions contained in the Management Plan for the Shenandoah Valley Battlefields National Historic District (District). (See Map 1). It is a companion to the Management Plan, which provides background and policy-level guidance, while this document provides additional detail about how to implement those policies effectively. The Implementation Plan outlines specific actions to be taken and provides recommendations for the planning projects called for in the Management Plan, to be undertaken during the first five to seven years of the program.

Background and Purpose of this Plan

The Shenandoah Valley Battlefields National Historic District and Commission Act of 1996 (Public Law 104-333) created and directed the Shenandoah Valley Battlefields National Historic District Commission (Commission) to prepare a plan for the protection, preservation, interpretation, public enjoyment, and management of Civil War resources and other historic and natural resources in the eight-county District. The Commission determined that the management of the District could most effectively be accomplished through a partnership strategy with a nonprofit “lead managing partner,” and established the new Shenandoah Valley Battlefields Foundation (Foundation). The public awareness and support for battlefield preservation and heritage tourism generated through the three-year life of the Commission are vital assets to successfully implementing the plan. The Commission did not want any of this momentum lost, and moved rapidly to establish the Foundation. This Implementation Plan was prepared for the Foundation and its partners to give them a “running start” toward success.

It may take 20 years to fully implement the actions proposed in the Management Plan. For the purposes of this document, however, a seven-year period is projected for the Foundation and its

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT



Map I Clusters Concept

partners to plan, develop, and implement a significant portion of the actions detailed here. A fundamental assumption in this action agenda is that the Foundation will start by supporting existing preservation, interpretation, and tourism entities and building their capacities to accomplish the vision of the Management Plan.

Lastly, it must be noted that this plan is not intended to be read straight through. It is very much a “composite” of ideas from the Management Plan. Its organization and guidance is intended to correspond and amplify the content of that plan. In this sense, the relationship of the Management Plan to the Implementation Plan may be likened to that between a textbook and a workbook. The former provides guidance, theory, and examples while the workbook shows the reader how to make practical applications of the text’s knowledge.

1.2 CONTENTS OF THE IMPLEMENTATION PLAN

The Implementation Plan is organized to correspond with the four major topics addressed in the Management Plan: battlefield and resource protection, interpretation, visitor services, and management. Chapters 2 through 5 of this plan each take up one of these topics, address the recommended actions from the Management Plan, and provide further detail on how they might be implemented. Chapter 6 summarizes all of the actions and suggests priorities, possible timing or phasing, and where the Foundation might take the lead responsibility. Here is an overview of the chapters in this plan.

Chapter 2: Management — describes the proposed organizational structure and activities of the new Foundation and its committees. It also describes the roles and relationships of principal partners and provides essential information about how the “cluster partners” might work with the Foundation and with each other.

Chapter 3: Battlefield and Resource Protection — builds on the battlefield and resource protection section in the Management Plan by providing additional guidance and describing how actions and partnerships might be undertaken. It contains a table describing “Techniques for Land Conservation,” evaluation criteria for individual battlefield parcels, and guidance for preparing battlefield preservation plans.

Chapter 4: Interpretation — details the actions needed to implement the interpretive programs outlined in the Management Plan. Its principal focus is on how to begin preparing the District-wide interpretive plan and creating collaborative educational programs in the District; it also addresses wayfinding and the interpretive role of the Civil War orientation centers to be developed by the Foundation's partners.

Chapter 5: Visitor Services — describes the specific actions needed to improve visitor services in the District, develop the District's image, and undertake a marketing program. The five Civil War orientation centers and the wayfinding system are also described in this chapter.

Chapter 6: Action Matrix — is a summary table of the actions presented in the preceding chapters. The actions are keyed to pages in this document where more detailed explanations may be found. The matrix also suggests the timing or phasing of the actions, and which actions the Foundation should take responsibility for leading. Other actions should be assigned to willing partners as time and opportunities suggest.

CHAPTER 2

MANAGEMENT

2.1 INTRODUCTION

2.2 THE ROLE AND STRUCTURE OF THE SHENANDOAH VALLEY BATTLEFIELDS FOUNDATION

2.3 WORKING WITH PARTNERS

2.4 WORKING THROUGH GEOGRAPHIC CLUSTERS

CHAPTER 2 MANAGEMENT

2.1 INTRODUCTION

P.L.103-444 and the Management Plan call for a partnership-based management program to be established for the Shenandoah Valley Battlefields National Historic District (District). This directive is to be fulfilled by the Shenandoah Valley Battlefields Foundation (Foundation), the new nonprofit organization that will serve as the “lead managing partner” for the District. The Foundation’s role is to:

- Provide a regional perspective and regional programs to preserve and interpret the District;
- Convene all relevant and willing stakeholders and provide leadership and support for their efforts in preservation, interpretation, and visitation; and
- Undertake ongoing outreach to the District’s constituents and supporters.

The new Foundation was incorporated on August 16, 2000, under the laws of the Commonwealth of Virginia. It is designed to meet the provisions of Section 606(f)(2) of the legislation, to fulfill the recommendations of the approved Management Plan, and, therefore, to have the authorities and responsibilities spelled out in the legislation.

The Foundation is to undertake directly certain responsibilities and actions; for many more, it will rely on its partners—public, private, and nonprofit—who choose to work with the Foundation. Partners enter into their relationships freely with the Foundation, work together jointly on projects, and maintain a close degree of communication about their joint actions.

This chapter describes both the Foundation’s structure and the partnerships that are expected to grow in the years ahead.

2.2 THE ROLE OF THE SHENANDOAH VALLEY BATTLEFIELDS FOUNDATION

The Foundation's mission is to preserve Civil War battlefields, both directly and by enabling others to do so, and to celebrate the Civil War heritage of the District. The Foundation's charge is to:

- Educate the nation;
- Inspire community pride;
- Stimulate economic development based on history, recreation, and conservation; and
- Serve as a national model.

In undertaking this mission, the Foundation should forge strong working partnerships among all those with a stake in the District's success. The Foundation should:

- Maintain the vision and direction provided by the Management Plan and report on its progress;
- Sponsor regional programs and planning in battlefield and resource protection, interpretation, and visitor services;
- Protect the ten battlefields named in the legislation in cooperation with others or individually;
- Market the District's heritage and educational experiences and work with others to do so;
- Provide leadership and direction for District partners;
- Provide technical assistance, educational programs, and grants to benefit partners;
- Convene partners to set policy;
- Represent the District in matters related to the protection of battlefields and interpretation of the Civil War heritage;
- Raise funds for operations and projects and for the support of partners' projects; and
- Take stands on issues in the District that have a bearing on its resources and the Management Plan.

The Foundation will be regional in focus, developing regional programs and plans. It will work with primarily with local partners on projects focused on the battlefields, related resources, and communities grouped into five geographic "clusters."

The Board of Trustees

As described in its By-Laws, the Foundation is governed by a Board of Trustees comprising up to 25 members and no fewer than 11. Following a one-year transition period, trustees will be elected to serve staggered three-year terms, and may be re-elected. The board is self-selecting with a Nominating Committee making recommendations to the seated board for new and returning trustees. The By-Laws require that:

- At least five trustees must represent individual local governments in the District;
- At least five must represent individual clusters;
- At least two must represent the Virginia General Assembly;
- One must represent the Governor of Virginia; and
- One must represent the Director of the National Park Service (NPS).

The latter two will serve *ex officio*. Trustees may represent more than one interest group, and a majority must be residents of the District.

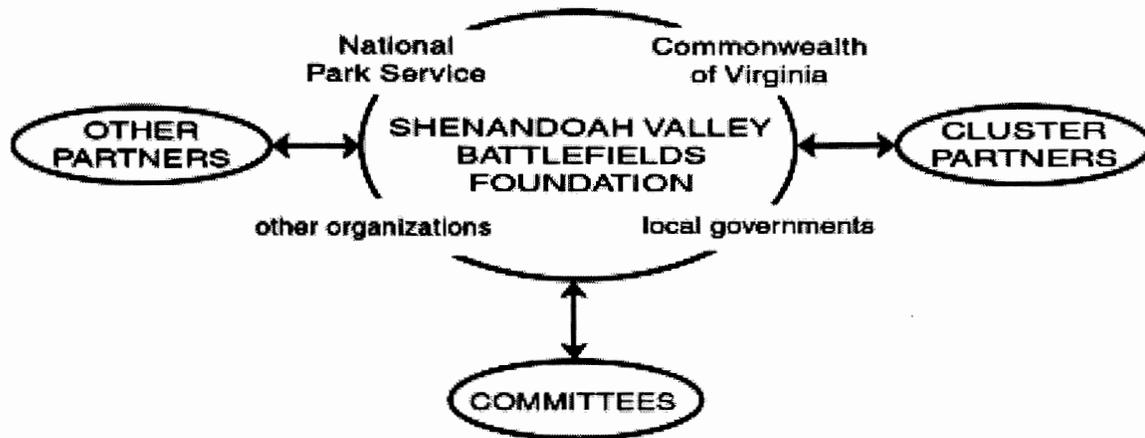
The trustees will elect officers from among their number on the recommendation of the Nominating Committee. The officers will include a Chair, a Vice Chair, a Secretary, and a Treasurer. These officers serve on an annual basis and are allowed to serve up to three consecutive one-year terms of office. All trustees must serve on one or more committees.

Committees

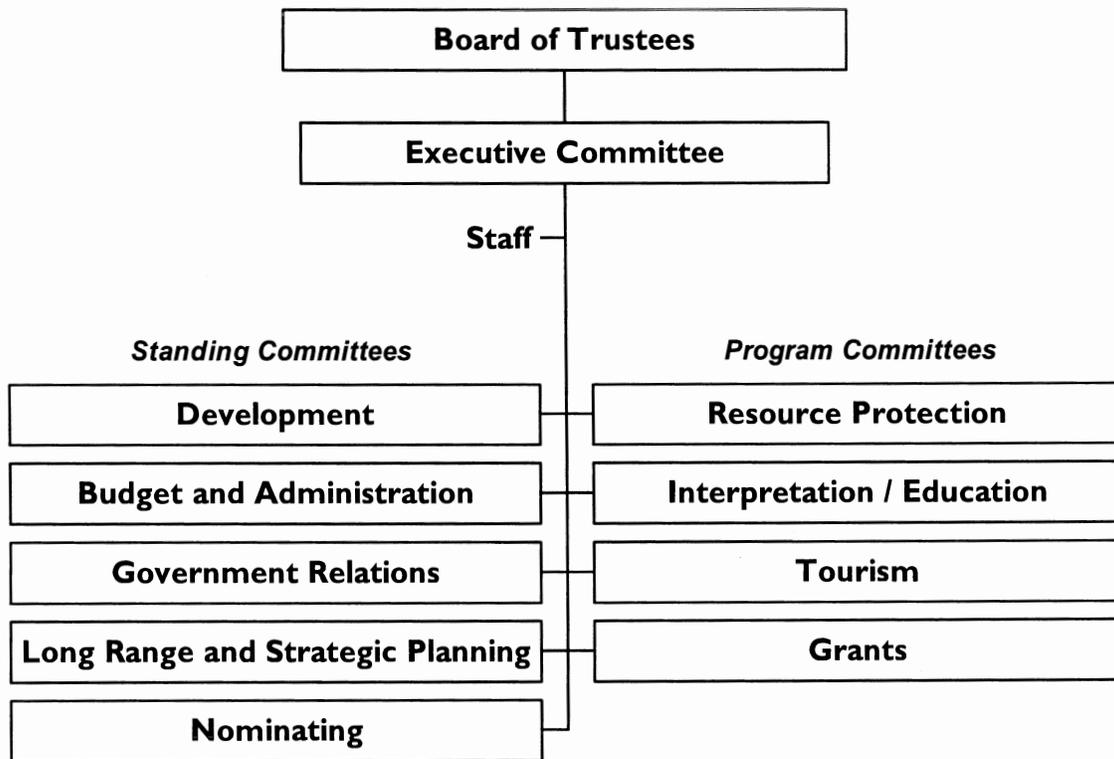
The Foundation will maintain three kinds of committees: an Executive Committee, “standing committees” for internal management of the Foundation, and *ad hoc* “program committees” for the District-wide or mission-driven tasks. All committees will advise the Board of Trustees on the expenditure of Foundation funds, policies, and programs. However, the board has ultimate responsibility for spending decisions and policy decisions that directly relate to the institution.

The Foundation’s committees are to be chaired by trustees, who are appointed by the Chair as recommended by the Nominating Committee. Except for the Executive Committee, committees may include non-trustee members.

**Figure 2.2-1 Foundation Partnership Chart
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**



**Figure 2.2 -2 Foundation Organization Chart
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**



Executive Committee

The Foundation's Executive Committee will consist of the officers, the immediate past chair, and up to two non-officer trustees appointed by the Chair. This committee has powers to act for and between meetings of the Foundation's board. It is empowered to make and implement certain decisions of the Foundation either as stated in the By-Laws or by vote of the board. The Executive Committee will also function as the "personnel committee" of the Foundation.

Standing Committees

The Foundation's By-Laws provide for five standing committees. These include:

Budget and Administration Committee — This committee oversees all fiscal and administrative affairs of the Foundation. It will be responsible for:

- Overseeing the management and expenditure of funds;
- Establishing accounts, conducting annual audits, and developing multi-year budgets;
- Reporting to the board on these matters; and
- Proposing financial management, personnel, and office business policies for review and approval by the Board of Trustees.

Development Committee — The Development Committee will be responsible for:

- Creating a long-range development program and short-range development campaigns,
- Working with the Budget and Administration Committee to develop budgets and establish funding goals based on strategic plans and needs assessments of the Foundation; and
- Working with the program committees to develop campaigns to raise needed funds for Foundation projects.

It will also investigate funding sources and review and report on all matters pertaining to annual giving, major gifts for endowment or expansion of Foundation programs, public relations, and membership promotion if the Foundation chooses to undertake a membership program.

Possible Membership Program — Following its transitional year, the Foundation may wish to consider establishing a program for non-voting individual members. This could be considered to be part of its

public outreach and education program. It would be a deliberate way to cultivate financial support from individual members. This membership program should have the following features:

- A modest fee to cover the costs of a newsletter widely mailed in the District (beyond the membership);
- Direct communications with constituents who are especially interested in the programs of the Foundation, by letter, special Website access, or other means;
- Support for a long-term program to recruit individual donors, including a tiered structure of membership whose higher-paying members might receive more benefits or invitations to events especially geared to their participation; and
- Courtesy discounts for individuals for the cost of memberships, entrance fees, events, or other benefits across the region, as a means of maintaining public interest and encouraging residents to participate in interpretive programs. Many of these benefits could be provided by partners as a part of their support for the Foundation. It could also be a means of interesting individual Foundation members in the programs of the Foundation's partners.

Another approach to be considered in the District would be to establish an organizational member program. This program would have many of the same features as the general member program but would most likely be composed of partners that are part of the Foundation's programs and focus.

Government Relations Committee — This committee will be responsible for:

- Nurturing on-going relationships between the Foundation and the federal, state, and local governments and their agencies; and
- Seeking opportunities to work with various levels of government to establish programs that support the vision and recommendation of the Management Plan.

With the large size of the District and the large number of jurisdictions operating within it, the work of the Foundation cannot succeed without the efforts of this committee. In the early years of the Foundation — until the board reaches its maximum number and volunteer committee members are recruited — this task may fall to the Executive Committee and other board members.

Long Range and Strategic Planning Committee — This committee will be responsible for:

- Developing and periodically updating a strategic plan for the Foundation. The initial strategic plan should articulate the Foundation's long-term goals and objectives. Given the array of

responsibilities outlined for the Foundation in the Management Plan and the need to increase its funding over a multi-year period, it will be critical for this committee to help the Foundation establish priorities. The strategic plan should also outline how and when additional responsibilities, programs, personnel, etc., would be added.

- Preparing a business plan (once the strategic plan is completed) as a more detailed guide for accomplishing the vision of the Management Plan and strategic plan.

Nominating Committee – The Nominating Committee has one of the most important roles in shaping the direction and management of the Foundation. It will be responsible for:

- Recommending to the Board of Trustees policies concerning board responsibilities and expectations, conflict of interest statements, etc.;
- Preparing and updating profiles of the expertise and interests of board members;
- Assessing the current and future organizational needs and seeking board members who can effectively fulfill those needs;
- Soliciting names of likely candidates for the Board of Trustees and conducting the requisite follow-up research;
- Nominating a slate of candidates to the Board of Trustees in compliance with the Foundation's By-Laws and subsequent policies;
- Preparing necessary board training materials and conducting training sessions for new board members; and
- Making recommendations to the Chairman of the board for committee chairmen and other positions as the chairman may request.

Program Committees

Program committees are to be formed and dissolved by the Foundation as needs and opportunities arise. They will carry out the primary work of the Foundation, including its three principal activities identified in the Management Plan: battlefield and resource protection; interpretation and education; and visitor services. Several of these committees may require sub-committees to manage the workload envisioned in the Management Plan and outlined in this plan. The following section describes the program committees initially needed.

Battlefield and Resource Protection Committee — This committee's activities are described in Chapter 3. In general, it will be responsible for:

- Making recommendations to the board for specific battlefield protection actions;
- Developing criteria and goals for land protection on the ten battlefields;
- Overseeing the preparation of the battlefield preservation plans called for in the Management Plan;
- Participating in the Foundation's grant making and fundraising programs for land and resource protection;
- Reviewing plans for Foundation-funded battlefield interpretive and visitor facilities and, with experience, adjusting the development guidelines as provided in the Management Plan;
- Taking positions concerning the policies and decisions of the District's local governments, the Commonwealth of Virginia, and the federal government as they affect the battlefields, Civil War-related resources of District, and implementation of the Management Plan; and
- Attending to other resource protection activities as described in the Management Plan, including agriculture, historic preservation, natural resource protection, recreation, and community planning and design.

Two subcommittees may be needed (described in Chapter 3); these are:

- Agriculture Subcommittee
- Historic Preservation and Community Design Subcommittee

Interpretation and Education Committee — This committee's activities are described in Chapter 4. In general, it will be responsible for:

- Developing and implementing a District-wide interpretive plan in collaboration with partners and other stakeholders; this plan should include a signage and wayfinding plan to be implemented by the Tourism Committee (see below);
- Initiating development of the Civil War orientation centers;
- Overseeing installation of interpretive programs at the orientation centers and the battlefields, according to the District-wide interpretive plan and coordinated with the battlefield preservation plans;
- Providing guidance to the Grants Committee and technical assistance to partners for a wide variety of interpretive activities outlined in the Management Plan and Implementation Plan.

- Identifying sources of funds and soliciting them in cooperation with the Development Committee to support interpretation and education; and
- Working with public schools (K-12) and other educational institutions and agencies to identify curriculum needs and create educational programs.

Tourism Committee — The Tourism Committee’s activities are described in Chapter 5 and concern the tourism, marketing, and promotion activities needed to attract visitors to the District, enhance hospitality services, and assure high-quality visitor experiences. In general, this committee will be responsible for:

- Developing and implementing a marketing plan in cooperation with Valley attractions and promotional organizations; this may require a sub-committee;
- Identifying sources of funds and soliciting them in cooperation with the Development Committee to support the marketing plan and its implementation;
- Overseeing the implementation of the signage and wayfinding component of the District-wide interpretive plan (as described in Chapter 4); this may require a sub-committee;
- Overseeing the development of promotional activities and materials that are identified in the marketing plan as the Foundation’s direct responsibility;
- Developing and beginning implementation of a graphic identity package (logo, etc.); this may require a sub-committee;
- Reviewing requests for marketing, promotional, and other technical assistance and grants from Civil War orientation center operators, towns, visitor centers, and interpreting institutions providing visitor services directly related to the needs of Civil War tourists; and
- Advocating for hospitality training and other programs to improve the visitor experience throughout the District.

Grants Committee — One of the Foundation’s primary responsibilities will be to make funds available to partnering organizations that are implementing aspects of the Management Plan. These funds will generally be made available through matching grants as the Foundation has funds available. The Foundation’s participation as a financial partner will signal that a project meets established levels of quality and fulfills expectations established in the Management Plan. The Grants Committee will be responsible for:

- Overseeing the implementation of the Foundation’s grants programs;
- Establishing criteria, guidelines, application forms, schedules, and funding budgets;

- Making preliminary recommendations for project selection and grant amounts;
- Insuring that appropriate funding requirements and reviews are built into the grant agreements (e.g., the Section 106 Programmatic Agreement requirements with the Virginia State Historic Preservation Officer, the Advisory Council on Historic Preservation, and the NPS); and
- Monitoring the progress of funded projects.

Other program committees are expected to participate or comment on the grant making responsibilities and may be asked to review grants in their particular areas of interest.

Staffing

The Management Plan outlines a substantial role for the Foundation. However, in developing the approved management option the Commission was clear that: 1) the management function should be via a partnership of agencies and organizations – rather than creating one large, stand-alone entity, and 2) the Foundation should encourage partners to assume particular roles in management and implementation. In keeping with this philosophy, the Foundation should maintain a small staff yet one of sufficient size to function efficiently and effectively given the projected workload. Following this approach will enable the Foundation to keep its overhead low and to direct more of its funds to cluster and other partners. Where another partner already has expertise in a particular area relevant to the implementation of the Management Plan, the Foundation should consider supporting that entity rather than duplicating that expertise within the Foundation.

In addition to paid staff, the Foundation needs to rely heavily on volunteer labor to carry out its mandated and assumed responsibilities. This volunteer expertise should come from the members of its Board of Trustees – this needs to be a “working board” – and from non-board committee members. In addition, the Foundation should actively recruit volunteers who are willing to devote time and talent to both office and mission-driven activities. The growing population of retired professionals living in the District is an excellent potential source of volunteers that should be cultivated.

At a minimum, the Foundation’s staff should consist of an executive director, an administrative assistant, and a program coordinator. Responsibilities of the three staff positions might include¹:

¹ These lists are not intended to be position descriptions but an overview of staff roles.

Executive Director — As the chief operating officer, the executive director is responsible for:

- Overseeing the daily management and operation of the Foundation's activities;
- Implementing policies, programs, and initiatives adopted by the Board of Trustees;
- Guiding and responding to the Board of Trustees and partners;
- Providing staff support to the Foundation's standing and grant making committees;
- Supervising the budgeting and fundraising activities;
- Hiring and supervising staff; and
- Maintaining public and governmental relations and community outreach programs.

In addition, the executive director should have technical experience to be able to manage one or more of the Foundation's programs.

Administrative Assistant — The administrative assistant is responsible for the oversight of the day-to-day business affairs and office management for the Foundation. The administrative assistant will be responsible for:

- Coordinating communication between trustees, staff, partners, volunteers, consultants, and the public;
- Maintaining office systems, purchasing supplies, and overseeing accounts;
- Preparing mailings and other forms of communication to Foundation trustees, interest groups, the public, and the media;
- Maintaining the Foundation's records and files;
- Assisting with the scheduling and coordination of meetings and events; and
- Supporting the work of individual committees as needed.

Program Coordinator — This position is responsible for initiating and supporting the mission-driven activities of the Foundation and partners. The program coordinator's responsibilities include:

- Supporting specific program committees;
- Directing programs of the Foundation and its consultants;
- Assisting with fundraising and grant writing required to support programs;
- Working with partners and local, state, and federal governments, and conducting other public relations and community outreach; and
- Supporting and cultivating volunteers.

This initial level of staffing is suggested keeping in mind that the NPS will likely have staff stationed in the District to work at Cedar Creek battlefield and assist the Foundation. The Management Plan calls upon the NPS to provide certain District-wide functions and support – as described further on in this chapter. The Foundation and the NPS should closely coordinate their roles on a continuing basis so that both their funding and staff expertise can be leveraged to the maximum degree in support of the partners and programs in the District.

The Foundation should also consider budgeting funds for independent contractors for specific short-term projects or studies. For example, if a particular District-wide tourism event is planned or a series of land protection seminars scheduled the Foundation could hire an independent contractor to manage such projects for their limited duration. Other expertise that could be contracted for might include fundraising/development or bookkeeping.

In addition, the Management Plan directs the Foundation to undertake a number of projects that will require the use of consultant expertise. Such studies include the battlefield preservation plans, the District-wide interpretive plan, and a marketing plan. These will be time and labor-intensive projects that can only be accomplished by professional consultants. However, these consultants will not support the on-going, day-to-day activities of the Foundation. They will supplement and support the staff, but will have a limited relationship with the organization.

Lastly, as funds and demands increase, the Foundation should consider adding the following positions:

- One or more additional “program coordinators”;
- A development professional;
- A volunteer coordinator; and
- A land planner or conservation specialist.

2.3 WORKING WITH PARTNERS

The Foundation’s partners are organizations and agencies that:

- Provide financial support and other resources to implement the Management Plan;
- Receive financial support and other resources from the Foundation; and
- Operate programs and projects in partnership with the Foundation.

The many partners with whom the Foundation will work in implementing the Management Plan include:

- Counties, cities, towns, and other public bodies, including economic development and tourism agencies;
- Citizens' groups and civic organizations concerned about battlefield and land conservation, historic preservation, the environment, and recreation;
- Nonprofit and private property owners of land and historic sites and buildings;
- State and federal agencies whose interests include: forestry, wildlife, water quality, roads and highways, recreation, agriculture, historic and cultural preservation, tourism, education, the arts and humanities; and others concerned with maintaining a high-quality environment and educational experience in the District;
- Business owners who depend on tourism and resource stewardship in the Valley; and
- Others, such as universities and museums, with ownership and programmatic responsibilities that affect the course of stewardship and education in the District.

These types of partners are expected to undertake a wide variety of projects and programs in response to the Management Plan. They should share information, collaborate among themselves as well as with the Foundation, and work toward the goals of the Management Plan.

The remainder of this section reviews the roles of key partners.

Local Governments and Organizations

A critical component to the Foundation's success will be the sustained involvement of the District's local governments and organizations, including individual agencies, school districts, and the regional planning district commissions. Their involvement will affect a wide variety of programs that are important to the Foundation, including preservation of the battlefields, Civil War interpretation, and educational programs. Without the support of local governments, the Foundation would have a difficult task recruiting the necessary support and resources from state and federal partners. The Foundation will encourage local governments and organizations to:

- Integrate the values and vision of the Management Plan in their plans, policies, and programs;
- Provide financial support to the Foundation;
- Provide financial support, technical assistance, and in-kind services to implement their respective components of the Management Plan;

- Participate as cluster partners;
- Keep the Foundation informed of their needs and ways it can assist in meeting those needs; and
- Work with the Foundation on setting policies and promoting District programs to potential supporters outside the District.

Commonwealth of Virginia

Virginia is asked to:

- Serve on the Foundation board, with the Governor, serving *ex officio*;
- Through the Virginia Military Institute, continue to operate the New Market Battlefield State Historic Site and Hall of Valor Museum in support of the Management Plan;
- Provide financial support for the Foundation's operations and a consistent level of matching funds on an annual basis to protect and interpret battlefields; and
- Adapt public policies and grant funding to support and protect the resources of the District.

Individual state agencies are expected to support the goals of the Management Plan through their public policies. These are agencies responsible for historic preservation, natural resource conservation, recreation, environmental protection, transportation, education, and the arts and humanities.

National Park Service and the U.S. Department of the Interior

The NPS is asked to:

- Serve on the Foundation board, with the Director of the Service, serving *ex officio*;
- Establish a new national park unit at the Cedar Creek battlefield and collaborate with adjacent partners;
- Develop facilities at Cedar Creek battlefield to support the Management Plan and the District-wide interpretive plan;
- Provide financial and technical support to the Foundation as authorized in P.L. 104-333;
- Provide a consistent level of funds on an annual basis for the purchase of land and interests in land to protect battlefields as authorized in Public Law 104-333; and
- Provide technical assistance throughout the District.

Other Federal Agencies

Other federal agencies may also play a role in the District and with the Foundation in the implementation of the Management Plan. Potential partners may include but are not limited to:

- U.S. Department of Agriculture;
- U.S. Department of Education;
- Institute for Library and Museum Services;
- National Endowment for the Humanities; and
- National Endowment for the Arts.

These agencies and others are possible sources of funding and technical assistance for the District's programs. These agencies would not necessarily serve on the Foundation's board.

Operators of Orientation Centers

The Foundation will encourage operators of Civil War orientation centers to:

- Participate in the preparation of the District-wide interpretive plan;
- Plan, fund, build, and operate their centers according to standards set by mutual agreement in the interpretive plan; and
- Support the development of interpretive sites and the protection and interpretation of battlefields within the clusters, through whatever resources they can provide.

2.4 WORKING THROUGH CLUSTERS

The Management Plan is premised upon what it terms the "clusters" approach to fulfilling the mandates of the enabling legislation. This community-based approach to preservation, interpretation, tourism, and partnerships received tremendous support from the public throughout the District and from the NPS, the Department of the Interior, and the Commonwealth. The "clusters" approach is a way to move District-wide programs and initiatives into the five clusters of battlefields, sites, and communities and put them "on the ground." It is meant to describe a means for the Foundation to work most effectively with

geographic sub-areas of the District while letting the personalities and preferences of the people and organizations in these clusters express themselves in the preservation, interpretation, and marketing of their communities. The Commission also believes that this approach will generate the greatest degree of local stewardship by building on community pride and encouraging local participation.

Clusters are five geographic groupings of battlefields and the towns and other visitor sites near those groupings (see map on page 2). Each cluster is to have a Civil War orientation center that will serve as the springboard for interpretation and visitation as described in Chapters 4 and 5. Ideally, every Civil War attraction will have at least one cluster to which it relates. Towns and sites that are situated between two geographic clusters or on the outer limits of the District may choose to orient themselves to one or more clusters. Their alliance may hinge on the relationship of events and interpretive stories these sites have to tell.

Key points about the clusters include:

- **The distinct variety of resources and personalities of each cluster will be emphasized and promoted in the District:** Each cluster is expected to provide a unique visitor experience that will evolve according to the work of cluster partners. If partners within a cluster elect to work together on a given project—forming and reforming their relationships as projects evolve—so much the better.
- **When the Foundation evaluates its plans and actions it will consider their effects on the partners in the clusters:** The Foundation will not favor one set of cluster partners over another. It will ask, “What is good for the cluster? Is this project likely to benefit the cluster and the District? How does this project affect the rest of the cluster and the District?”
- **The individual and collective interests of the cluster partners are expected to influence the Foundation:** The Foundation will elect one trustee to represent each of the five clusters to assure that the entire District is fairly represented. These and other trustees are expected to help inform and shape the Foundation’s decisions by communicating the interests and concerns of the cluster partners to the full board. Likewise, they are expected to be an emissary from the Foundation to the clusters, articulating the Foundation’s position and expectations.
- **Cluster partners should focus and collaborate on the visitor experience in their clusters:** They should expect to:
 - Help set direction and provide support for the development of a Civil War orientation center in each cluster (as described in Chapter 5);

- Implement projects acting alone or collectively;
- Work with the local governments in the cluster to engage them in the cluster-based programs and projects; and
- Raise funds for selected projects they are participating in, and those proposed by their partners.

In the first year, the Foundation should convene stakeholders from each of the clusters to discuss implementing the Management Plan in that cluster. In the first year, cluster-based partners should expect to focus on the following:

- Assisting the Foundation in identifying and endorsing interim Civil War orientation centers;
- Participating in the District-wide interpretive plan to understand interpretive and visitor experience needs;
- Participating in the battlefield plans to understand resource protection needs, to identify potential projects to be supported in the clusters, and to understand how these needs might influence the visitor experience; and
- Sponsoring individual projects that reflect the needs of the District as expressed in the Management and Implementation plans.

CHAPTER 3

BATTLEFIELD AND RESOURCE PROTECTION

3.1 INTRODUCTION

3.2 BATTLEFIELD PLANS

3.3 LAND ACQUISITION PRIORITY RANKING SYSTEM

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CHAPTER 3 BATTLEFIELD AND RESOURCE PROTECTION

3.1 INTRODUCTION

The protection of Civil War battlefields and related cultural and natural resources for the public's education and enjoyment is the premise upon which the Shenandoah Valley Battlefields National Historic District (District), the Management Plan, and the new Shenandoah Valley Battlefields Foundation (Foundation) were created. This chapter builds on the resource protection recommendations from the Management Plan and provides additional direction for the Foundation and its partners to continue their stewardship efforts.

3.2 BATTLEFIELD PLANS

One of the important aspects of the Management Plan is that it lays out a comprehensive framework for making land protection decisions. This is especially critical because of the extent of the battlefields and the expense of preservation. The Management Plan calls for the Foundation to approach battlefield protection as a flexible, creative process involving many partners, most importantly the landowners themselves.

Preparing individual battlefield preservation plans is one of the first steps recommended for long-term stewardship. These plans will guide the Foundation and its partners in making strategic decisions about land protection. Preparation of these plans as well as protection of land is contingent upon available funding.

Roles of the Foundation and Partners in Battlefield Preservation Planning

The Foundation, its partners, or both working in collaboration, may take the lead in developing battlefield preservation plans depending on the individual circumstances. In all cases, the Foundation's role should be to participate directly, to assure consistency in quality and approach to all the plans, and to ensure participation by relevant stakeholders. The Foundation should initiate at least one battlefield plan during its first year to serve as a template for the others.

The Foundation should also assist in funding these plans, encouraging local jurisdictions or interested private organizations to contribute toward their preparation, and seeking other sources of funding. For example, the American Battlefield Preservation Program is one source that provides funding to battlefield organizations to prepare preservation plans.

Battlefield Preservation Plans

The preservation plans envisioned for the ten battlefields should focus directly on a specific battlefield (or group of battlefields) and chart a course for its future protection, development, and use. There are many types of battlefield plans. A variety of plans have already been prepared for battlefields in the District. These include:

- Study of Civil War Sites in the Shenandoah Valley of Virginia (1992)
- Master Plan for Port Republic Battlefield Site (1994)
- Survey and Mapping of Fisher's Hill Battlefield Earthworks (1994)
- Frederick County-Winchester Civil War Site Inventory (1994)
- McDowell Battlefield Master Plan (1995)
- Kernstown Battlefield Management Plan (1996)
- Battlefield Network Plan, Frederick County (1997)
- Third Winchester (Opequon) Battlefield Preservation Plan (1999)
- Final Environmental Impact Statement for the Shenandoah Valley Battlefields National Historic District Management Plan and Special Resource Study (2000)
- Final Management Plan for the Shenandoah Valley Battlefields National Historic District (2000)
- Shenandoah Valley Battlefields National Historic District Special Resource Study (2000)
- Draft Rose Hill Farm Preservation Plan (First Kernstown Battlefield) (2000)

These plans have been prepared for a number of purposes ranging from documenting and mapping battlefields, to interpretive planning for a protected parcel to the Commission's Management Plan for the entire District. Of the plans completed to date, only the *Third Winchester (Opequon) Battlefield Preservation Plan* made detailed preservation recommendations for an entire battlefield. Modeled on this plan, the forthcoming plans should make recommendations for entire battlefields—core areas, study areas, viewsheds, and related resources deemed important for protection.

Using the battlefield boundaries as shown on the maps contained in Appendix E of the Management Plan, the individual plans should set priorities for preservation that will guide and validate the land protection actions of the Foundation. Through broad participation of landowners and other stakeholders, the planning process should develop community consensus and foster support for preservation. The plans should also steer fundraising and policy making. They will serve as strategic plans to direct battlefield preservation, as parcels and funding become available.

Components of Battlefield Preservation Plans

The battlefield preservation plans should:

- Assess the level of threat;
- Document the resource;
- Analyze the combination of protection tools that will work best for the landowners in the area; and
- Recommend priorities, means, and a strategy for protecting the battlefield on a parcel-by-parcel basis.

The plans are to be detailed and specific, and include recommended goals and actions for preservation. Active participation in all stages of the planning process by landowners, local governments, stakeholders, partners, and citizens of the area is critical, because their help will be needed to implement the recommendations.

While the ten battlefield plans need to be similar in scope and level of detail, they need not be identical. The Management Plan is premised upon a “clusters” or community-based approach to preservation and envisions that preservation actions will be tailored to what landowners and adjacent communities want to see happen to their battlefields. Like land preservation options, the plans must also be flexible. While they may focus on one issue or a combination of land protection, historic

interpretation, visitor services, and management issues, their primary focus must be on preservation of the resource.

These plans should address public access and related issues but stop short of fully planning for interpretation and visitor services. The District-wide interpretive plan (See Chapter 4) will address interpretive and educational programs for visitors; battlefield plans completed after the interpretive plan might draw from its recommendations.

Each battlefield preservation plan should contain the following components:

- **Introduction**
 - Purpose of the plan
 - Vision and goals
 - Methodology
- **Existing Conditions**
 - Description and map of the battlefield area (core area, study area, viewshed, plus any additional resources to consider)
 - Description of the resource and current levels of protection, historic designation, etc.
 - Environmental conditions
 - Community assets
 - Current land use, development trends, ownership, threats to the resource, and land values
 - Related transportation plans and issues, including road improvements and parking
- **Historical Significance of the Battlefield:** This section may be brief and reference sources for more detailed information, as well as topics that require further research.
- **Complete Database:** Develop or update a GIS mapping database for the battlefield core area, study area, and viewsheds. This should be tied to a parcel-by-parcel inventory in database form that includes text (ownership, acreage, significance, level of threat, etc.) and photos.
- **Public Policy:** This section should describe public policies and plans concerning land use, community design, conservation, recreation, transportation, economic development, and other regional issues. It should include specific discussions of state and local policies that may threaten or affect conservation and development of the battlefield, including descriptions of existing policies and recommendations for improvements and new policies.

- **Menu of Protection Options:** The Land Preservation Toolbox matrix in section 3.4 presents a menu of options for land protection. The plan should recommend which of these as well as other options might be used for specific battlefield parcels.
- **City, Town, or Village Issues:** Where a settlement is a part of the battlefield, it is important to recognize its needs. These battlefields involve communities: McDowell, Port Republic, New Market, Fisher's Hill, Tom's Brook, Cedar Creek, and the Winchester battlefields.
- **Stakeholders and Partners**
- **Sources of Funding** (as a technical supplement)
- **Recommendations and Priorities for Protection by Parcel:** These should be developed using the Land Acquisition Ranking System described below. This information should be presented in table form in the plans for ease of use. Analysis should include core area, study area, and viewsheds. Recommendations will be tailored to the needs and conditions of each parcel and will likely include a wide range of protection techniques, e.g., fee purchase, easement acquisition, etc. In addition, the analysis in each battlefield plan should lead to setting a goal for the amount of land to be permanently protected.
- **Management Issues:** The plan needs to address such questions as which organization or partners are to be responsible for implementing the plan, raising the funds, maintaining public access, providing public facilities, and building new visitor facilities. It should also address how environmental problems will be solved or avoided. These are a sample of critical questions that need to be addressed. Not all may be answered in battlefield preservation plans, but they require identification and consideration of options.
- **Recommended Actions and Tasks**

When preservation plans are *combined* with interpretation plans they should include the following additional topics:

- **Interpretation**
 - Existing interpretation
 - Story line and key themes
 - Interpretive media and programming
 - Recommended actions and tasks
- **Visitor Services**

While these battlefield preservation plans will not be complete management plans, they should consider visitor service needs identified for each of the ten battlefields addressed in the Management Plan and should coordinate with the recommendations of the District-wide interpretation plan.

Request for Proposals for Battlefield Plans

Requests for proposals (RFP) should target individuals, firms, or teams with experience and professional expertise in battlefield preservation. The Foundation should maintain a list of qualified consultants; other sources of consultant names include the Virginia Department of Historic Resources, the National Park Service (NPS), and the Civil War Preservation Trust.

The RFP should provide background on the project; a description of the battlefield(s); a list of any plans or research prepared to date; expected start and finish dates; a contact for further information; and the deadline for the receipt of proposals. If possible, the RFP should announce the interview date.

The entity sponsoring the plan should be prepared to accommodate requests for additional information, site visits, or both by prospective candidates. The plan's sponsor should interview prospective candidates. Preferably the interview panel should include experts in the diverse topics the plan will consider.

The request for proposals should ask candidates to submit the following:

- Qualifications and experience;
- Description of and sample work in battlefield planning;
- Relevant experience in land conservation and planning;
- Relevant experience working with landowners and holding community meetings;
- Demonstration of documentation and mapping abilities;
- Philosophy and approach to the project;
- Proposed timeline for completion of the plan;
- Proposed budget, including hourly rates for services and an indication of which individuals, if part of a team, will be working on specific aspects of the project; and
- References.

3.3 LAND ACQUISITION PRIORITY RANKING SYSTEM

The Management Plan includes criteria for evaluating and setting priorities for protecting battlefield land. The Land Acquisition Priority Ranking System is a general guide for determining preservation priorities. The Foundation should make ongoing refinements to the system as experience dictates.

The ranking system should be used in developing the individual battlefield preservation plans. It should also be used in making critical interim battlefield preservation decisions until the battlefield preservation plans are completed. The Foundation should maintain a District-wide list of preservation priorities that is updated regularly. The ranking system sets up various criteria for evaluating land for preservation, interpretation, visitor services, and viewshed management. For each criterion, point values are given with guidance provided for the assignment of points.

The ranking system is presented in this plan in a worksheet format for use in evaluating battlefields and parcels. The system contains two parts: Worksheet 1 is for ranking individual parcels within a battlefield, and Worksheet 2 is for setting priorities among battlefields. The highest number of points an individual parcel within a battlefield could receive under the system is 40; the highest number of points a parcel could receive in the ranking among battlefields is 20. The system should be re-evaluated periodically to keep the system current with the Foundation's knowledge, experience, and priorities.

Worksheet 1 Land Acquisition Priority Ranking System for Individual Parcels within a Battlefield (1 of 3)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Battlefield: _____ Parcel: _____
 Date: _____

Category	# Points	Guidance for Point Assignment	Comments	Score
Acquisition purpose	2	Historic preservation/interpretation		
	1	Visitor service/viewshed management		
Preservation value	8	Large parcel		
	6	Small parcel, contiguous on battlefield		
	4	Small parcel, non-contiguous on battlefield		
	2	Small parcel, non-contiguous in viewshed		
	0	None of the above		
Integrity of tract	10	Very high integrity		
	8	High integrity		
	6	Moderate integrity		
	4	Low integrity		
	0	Lost		
Threat of development	10	Immediately threatened		
	8	Highly threatened		
	6	Moderately threatened		
	4	Somewhat threatened		
	2	Potentially threatened		
	0	Not threatened		
Historic Significance	0	Lost		
	10	Highest Significance		
	8	High significance		
	6	Significant		
	4	Moderate significance		
2	Moderately low significance			
0	Lowest significance			
Total	40			
	Possible			

Worksheet 1 Land Acquisition Priority Ranking System for Individual Parcels within a Battlefield (2 of 3)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Category # Points Guidance for Point Assignment

Acquisition purpose	2	Historic preservation / interpretation
	1	Visitor services/ watershed management
Preservation value	8	Large parcel (at least 100 acres) on battlefield
	6	Small parcel contiguous to land already preserved on battlefield
	4	Small non contiguous parcel on battlefield or small contiguous parcel within viewshed
	2	Small non-contiguous parcel within viewshed
	0	None of the above
Integrity of tract	10	Very High Integrity: Current use mirrors Civil War conditions; historic structures/features still present; no non-contributing features on site; no non-contributing features visible off site.
	8	High Integrity: Current use mirrors Civil War conditions; historic structures/features still present; no non-contributing features on site; some visual intrusions from off site.
	6	Moderate Integrity: Current use mirrors Civil War conditions; historic structures/features still present; minor non-contributing features on site; some visual intrusions from off site.
	4	Low Integrity: Current use mirrors Civil War conditions; historic structures/features damaged or lost; non-contributing features on site and off site, though not so extensive as to mar Civil War ambience.
	0	Lost: Current use does not mirror Civil War conditions; historic structures/features lost; high level of visual intrusions both on and off site.
	10	Immediately Threatened: Zoned for development; Comp. Plan recommends development; not in Ag. District; developers interested.
	8	Highly Threatened: Zoned for development; Comp. Plan recommends development; not in Ag. District; currently not a hot area for major growth, but some subdivision occurring. (Could include tracts zoned agriculture, but planned for development and in hot market.)
6	Moderately Threatened: Zoned for agriculture or conservation; Comp. Plan recommends development; not in Ag. District; developers seem interested, some subdivision occurring.	

Worksheet 1 Land Acquisition Priority Ranking System for Individual Parcels within a Battlefield (3 of 3)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Category		# Points	Guidance for Point Assignment
Threat of development (continued)	4	<p>Somewhat Threatened: Zoned for agriculture or conservation; Comp. Plan recommends development; in Ag. District; developers seem interested, some subdivision occurring. (Could include tracts planned and zoned for agriculture, but weak zoning ordinance allows significant subdivision.)</p> <p>Potentially Threatened: Zoned for agriculture or conservation; Comp. Plan recommends agriculture or conservation; not in Ag. District; some subdivision occurring.</p> <p>Not Threatened: Zoned for agriculture or conservation; Comp. Plan recommends agriculture or conservation; in Ag. District; area not experiencing growth.</p> <p>Lost: planned and zoned for development; development announced; surrounded by land already developed.</p>	
	10	<p>Highest Significance: Located in core. Contains large proportion of key ground (ground where the most important action of the engagement occurred). Historic features / structures present.</p>	
	8	<p>High Significance: Located in core. Contains moderate proportion of key ground (ground where the most important action of the engagement occurred). Historic features / structures present.</p>	
	6	<p>Significant: Located in study area or core. Contains ground on which fighting or other important battle activities occurred. Historic features / structures present.</p>	
	4	<p>Moderate Significance: Located in study area or core. Contains ground on which fighting or other important battle activities occurred. Historic features / structures absent.</p>	
Historic Significance	2	<p>Moderately Low Significance: Located outside study area. Includes rear staging areas, camp sites, isolated landmarks.</p>	
	0	<p>Lowest Significance: Located outside study area. Forces may have moved through the area, but otherwise action or events on the tract were not significant.</p>	

Worksheet 2 Land Acquisition Ranking System for Evaluating Priorities within the Entire District (1 of 2)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Battlefield: _____ Parcel: _____

Date: _____

Category	# Points	Guidance for Point Assignment	Comments	Score
Integrity of Battlefield <i>(see page 2 for guidance)</i>	5	GOOD		
	4	FAIR		
	3	POOR TO FAIR		
	2	POOR		
	1	LOST		
Threat of Development to battlefield <i>(see page 2 for guidance)</i>	5	HIGHEST		
	4	HIGH MODERATE		
	2	LOW MODERATE		
	0	LOWEST		
Historic Significance	5	Nationally significant according to Civil War Sites Advisory Commission Report on the Nation's Civil War Battlefields - Class A.		
	4	Having direct and decisive influence on campaign - Class B. Large forces engaged. High fatalities. High attrition.		
	3	Having direct and decisive influence on campaign - Class B. Smaller forces engaged. Fewer fatalities. Lower attrition.		
	2	Having observable influence on the outcome of a campaign - Class C.		
	1	Locally significant - Class D.		
Non-federal funding available	5	50% or more available.		
	3	More than 25%, but less than 50% available		
	2	More than 5%, but less than 25% available.		
	0	None available		
TOTAL	20			
	Possible			

**Worksheet 2 Land Acquisition Ranking System for Evaluating Priorities within the Entire District (2 of 2)
Ratings of Battlefields Regarding Integrity and Threat of Development**

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Integrity of Battlefield		# Points	Comments
GOOD	McDowell	5	
	Cross Keys	5	
	Port Republic	5	
FAIR	Fisher's Hill	4	
	Toms Brook	4	
	Cedar Creek	4	
POOR	Second Winchester	2	
	Second Kernstown	2	
	New Market	2	
	Opequon / Third Winchester	2	
Threat of Development to Battlefield			
HIGHEST	Opequon / Third Winchester	5	
	Second Winchester	5	
	Second Kernstown	5	
HIGH MODERATE	New Market	4	
	Toms Brook	4	
LOW MODERATE	Fisher's Hill	2	
	Cedar Creek	2	
	Cross Keys	2	
LOWEST	Port Republic	0	
	McDowell	0	

Note: Last updated in August 2000; derived from NPS 1992 study

Preservation Priorities

The Management Plan calls for three levels of priority for land protection:

1. The core area of battlefields;
2. The study area of battlefields; and
3. Related Civil War resources.

With these as guidance, the Foundation and partners can use the ranking system to establish priorities for protecting individual parcels and battlefields. These priorities should also be reflected in the battlefield preservation plans.

The Management Plan suggests the following principles to guide preservation and acquisition of land:

- Preserve critical and significant parcels of battlefield land through voluntary means;
- Preserve land needed to interpret the District's Civil War stories; and
- Conserve the wealth of Civil War, historic, cultural, agricultural, natural, scenic, and recreation resources in the District.

It is neither possible nor desirable to acquire all of each battlefield for preservation and public access. The individual battlefield preservation plans should recommend degrees of preservation for parcels on each battlefield and identify the appropriate preservation "tools" for their protection. This analysis in each battlefield plan should lead to setting a goal for the amount of land to be permanently protected. The following figure describes acreage currently protected on the ten battlefields as well as the number of acres that retain integrity.

Figure 3.3 Battlefield Size, Integrity, and Protection, 2000
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Battlefield	Core Area Acreage	Study Area Acreage	Core Acres Retaining Integrity	Core Acreage Protected
McDowell	2,258	4,539	2,258	261
Cross Keys	2,153	5,450	2,032	191
Port Republic	2,145	4,936	2,110	10
New Market	2,261	5,611	1,527	238
Tom's Brook	2,018	6,644	1,672	61
Fisher's Hill	2,751	9,644	2,328	239
Cedar Creek	6,252	15,607	5,475	582
Second Winchester	3,113	22,274	1,299	7
Second Kernstown	2,203	5,861	770	315
Opequon (Third Winchester)	4,914	11,670	1,625	229
Total Acreage	30,068	92,236*	21,096 (70%)	2,133 (7%)

Source: *Study of Civil War Sites in the Shenandoah Valley of Virginia*, NPS 1992; updated by Commission and OCULUS, 2000

* Study Area acreage includes Core Area acreage

3.4 LAND PRESERVATION TOOLBOX

Figure 3.4 describes a wide range of land protection options available to landowners, the Foundation and its preservation partners. This “tool box” of techniques was prepared at the direction of the Commission and appears in the Management Plan.²

² Sources:

- Preservation Alliance of Virginia, *Virginia's Rural Historic Districts: Making the Case*. 1998.
- The Regional Plan Association, the Trust for Public Land, and the National Park Service, *Tools and Strategies: Protecting the Landscape and Shaping Growth*. The Open Space Imperative #3, a Regional Plan Association publication, 1990.
- Stokes, Samuel N., A. Elizabeth Watson, and Shelley S. Mastran, *Saving America's Countryside*. The Johns Hopkins University Press, 1997.

Figure 3.4 Techniques for Land Conservation (page 1 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Land purchase at fair market value³</p> <p><i>Full protection of land in perpetuity</i></p>	<p>A transfer of ownership to a willing buyer from a willing seller at fair market value.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 60 days to one year.</p>	<p>Purchase price of land. Closing costs. Appraisal cost (not always required). Maintenance costs of land including taxes.</p>	<p>Strongest; allows complete control over the parcel.</p>	<p>Usually none. Local governments may find it advisable to transfer a conservation easement (see action described below) to an independent qualified holder to bind future officials to conservation intent.</p>	<p>Shenandoah Battlefield Foundation (Foundational partners, local, state, federal government conservators, minded buyers)</p>
<p>Land purchase at bargain price (less than fair market value)</p> <p><i>Full protection for lower purchase price</i></p>	<p>See above. Buyer agrees to accept less than fair market value, and if selling to a nonprofit or government buyer, the seller may be able to deduct the difference in value as a charitable contribution for state and federal income taxes. Federal deduction generally allowed if the difference in value is 20 percent.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 60 days to one year.</p>	<p>Reduced purchase price of land. Closing costs. Appraisal cost (not always required). Maintenance costs of land including taxes.</p>	<p>Strongest; allows complete control over the parcel.</p>	<p>Usually none. Local governments may find it advisable to transfer a conservation easement (see action described below) to an independent qualified holder to bind future officials to conservation intent.</p>	<p>Foundational partners, local, state, federal government conservators, minded buyers</p>

Note: "Degree of Restriction" refers to the level of conservation protection for a property as it is transferred from one owner to another, or once the technique in question is implemented.

transactions listed in this document may be initiated by the property owner or solicited by a land conservation entity.

**Figure 3.4 Techniques for Land Conservation (page 2 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Acquisition of land via donation or bequest</p> <p><i>Full protection and tax benefit for seller</i></p>	<p>Property owner freely transfers the property by transferring the deed or by instructions in his or her will</p>	<p>Owner may initiate the bequest or donation. Timing varies—60 days to a year for donation; for a bequest, the property would not be transferred until death of the owner.</p>	<p>Donor or the estate of the party making the bequest typically covers transfer costs. Maintenance costs of land including taxes.</p>	<p>Strongest; allows complete control over the parcel.</p>	<p>Donor may choose to stipulate restrictions. Recipients generally prefer to be told of the donation or bequest in advance and to work with the donor on terms, and may refuse unexpected donations or bequests.</p>	<p>Foundations, local, state or federal government</p>
<p>Acquisition or receipt of charitable remainder trust (or "donation with reserved life estate")</p> <p><i>Full protection similar to bequest without potential for contested wills</i></p>	<p>Sale or donation (for charitable deduction) of property with retention of use by seller/donor until the seller/donor or his or her heirs die. Further stipulations may be applied. Owner can take a deduction for the donation immediately.</p>	<p>Owner initiates the transaction. Timing varies—6 to 12 months.</p>	<p>Administrative costs. Maintenance costs of land including taxes.</p>	<p>Strongest; allows complete control over the parcel once acquired. (Acceptance of the trust can be conditioned on maintenance of property so as to maintain integrity.)</p>	<p>Often none. Use may be restricted to terms negotiated between recipient and donor.</p>	<p>Foundations, local, state or trusts.</p>

is unusual but not unheard of for property owners to donate property to governmental bodies. Other techniques following this point may also be used by governmental bodies to provide but require a level of expertise and experience more often found among land trusts, which can work on behalf of governmental bodies.

Figure 3.4 Techniques for Land Conservation (page 3 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technology
<p>Acquisition of option or right of first refusal</p> <p><i>Securing exclusive purchase arrangements</i></p>	<p>Property owner agrees to sell or donate a property or property interest by either of two methods:</p> <p>Purchase option – allowing the purchaser the right to buy the property at a later date at a specified value (or with an agreed process for determining future value)</p> <p>Right of first refusal – the right to match a <i>bona fide</i> offer of purchase within a specified period of time.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 30 days to one year. Property itself may not be acquired for years.</p>	<p>Purchase price of option or right of first refusal.</p> <p>Legal fees.</p> <p>Recording costs.</p> <p>Associated purchase costs when actual purchase occurs.</p> <p>Maintenance costs of land including taxes.</p>	<p>Strong when option or right is exercised. (May be conditioned on maintenance of property so as to maintain integrity.)</p>	<p>Usually none.</p>	<p>Foundations, partners, landowners or conservation-minded buyers</p>
<p>Acquisition or receipt of undivided interest</p> <p><i>Ownership of a share of a property to affect the use of the whole property</i></p>	<p>Acquisition or receipt of donation of an interest or share of a property.⁵ Usually occurs when multiple owners collectively share ownership. Each owner enjoys equal property rights.</p> <p>Such owners may sell or donate their interest to a conservation-minded buyer (if transferred to a nonprofit via donation or bargain sale, the value may be deductible), thus potentially limiting use of other owners.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 6-12 months.</p>	<p>Purchase price of interest.</p> <p>Closing costs.</p> <p>Maintenance costs assignable to the interest obtained, including taxes.</p>	<p>Protection depends upon scope of ownership interest.</p>	<p>Undivided interest permits holder a voice in operation or disposition of property, including the power to force sale or division of the parcel.</p>	<p>Foundations, partners, landowners or conservation-minded buyers</p>

⁵Note the difference between the following: rights of a property (development, use, mineral, etc.), share of property (multiple owners with equal rights to a single parcel of land), and division of property (into individual parcels).

Figure 3.4 Techniques for Land Conservation (page 4 of 9)

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Land exchange</p> <p><i>Swapping land to improve effectiveness of conservation activities</i></p>	<p>Public entities or nonprofits exchange developable land of low conservation value for land with high conservation value. Can be exchanged between private and public entities. May reduce capital gains taxes for original owner of protected land.</p>	<p>Depends on available funding, parcel for exchange, and speed with which purchaser(s) can act; 6-12 months.</p>	<p>Administrative costs. Closing costs. Appraisal costs. Maintenance costs of land if exceeding original holding or if property was bought for the exchange, including taxes.</p>	<p>Strongest; allows complete control over the parcel. Land exchanged may or may not be restricted via conservation easement or covenant.</p>	<p>Usually none.</p>	<p>Foundations, partners, landowners, or conservation-minded buyers</p>
<p>Donated conservation easements</p> <p><i>Conservation through partial ownership</i></p>	<p>Owner of land voluntarily restricts the developable use of the land by stating limits in the deed, according to rules specified under Virginia law. The limits form a transferable interest that can be donated to a qualified organization⁶ and the value may be deductible from state and federal income taxes.</p>	<p>For purchased easements, depends on available funding and speed with which purchaser(s) can act; if donated, the recipient may initiate; 3-12 months.</p>	<p>Administrative costs. Appraisal, documentation, and endowment costs.⁷ Recording costs. Annual inspection costs, when not covered by endowment.</p>	<p>Second strongest after fee simple ownership.</p>	<p>Depends on terms of easement; development, subdivision (beyond reservations for use by the owner and family) or a substantial change in use may be prohibited. Easement restricts all future owners.⁸ Easements often address property maintenance and provide a right of inspection.</p>	<p>SVBF, District partners, landowners, and local, state, federal government</p>

⁶ Nonprofit organizations must wait five years to hold non-apurtenant easements in Virginia. There is no waiting period for co-holding easements when one co-holder has been qualified under Virginia law. Organizations receiving donated easements for which the donor intends to take a federal tax deduction must be qualified under federal tax rules.
⁷ The Virginia Open Space Land Preservation Trust Fund may pay for appraisal, survey, and documentation expenses for donated easements. Endowment and other donation expenses are generally tax deductible as charitable contributions. Endowment pays for monitoring and enforcement. Documentation provides "base line" data for monitoring. Easements must be re-recorded periodically to assure they remain in force under state law.

Figure 3.4 Techniques for Land Conservation (page 5 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Purchased conservation easements</p> <p><i>Conservation through partial ownership</i></p>	<p>Same as above, except that owner sells the interest in exchange for cash and/or other financing and may therefore pay capital gains taxes. Most often used to conserve farmland by limiting development.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 6-12 months.</p>	<p>Administrative costs. Appraisal, documentation and endowment costs. Recording costs. Annual inspection costs.</p>	<p>Second strongest after fee simple ownership.</p>	<p>Depends on terms of easement; subdivision, reservations for use by the owner and family) or a substantial change in use may be prohibited. Easement runs with land, restricting all future owners.⁵ Easements often address property maintenance and provide a right of inspection.</p>	<p>Federal, state or local government. Land trusts use this technique to help them have funding.</p>
<p>Covenants¹⁰</p> <p><i>Deed restrictions</i></p>	<p>A restriction of use placed on a property by the owner before the property is sold. Though generally voluntary, covenants can bind future owners. Similar to an easement if used by a nonprofit or government. May be purchased or donated, but donation may not be deductible.</p>	<p>Time varies with negotiation; 3-12 months.</p>	<p>Same as an easement.</p>	<p>If adjacent to land permanently held by a nonprofit or corporation covenant holder, second strongest after fee simple ownership.</p>	<p>Depends on terms of covenant. A covenant may not bind future owners.</p>	<p>Foundations, land trusts, local partners, individuals and neighborhood conservation buyers.</p>

¹⁰ The Virginia General Assembly must grant each interested local government the authority to use public funds to purchase easements.

This technique is best used where the covenanted land is adjacent to land owned by the covenant holder; for a nonprofit, this approach is similar to a conservation easement.

Figure 3.4 Techniques for Land Conservation (page 6 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Lease, with option to buy</p> <p><i>Temporary conservation with potential for long-term conservation</i></p>	<p>A rental agreement for a specified period of time, with an extra, legally recorded clause for optional purchase at a specified price.</p>	<p>Depends on available funding and speed with which purchaser(s) can act; 3-12 months.</p>	<p>Negotiable between lessee and lessor.</p> <p>Closing costs.</p> <p>Maintenance costs of land including taxes.</p> <p>Legal expenses of drafting agreement.</p>	<p>Until option to purchase is exercised, it is only as strong as the terms of the lease and the intentions of the landowner.</p>	<p>Use restricted to terms negotiated between lessor and lessee.</p>	<p>Foundation partners, and trusts.</p>
<p>Leases and management agreements</p> <p><i>Low-cost, temporary conservation method</i></p>	<p>Leases are rental agreements and may be governed by legal rules; management agreements may have fewer legal rules but work in essentially the same way. Rental payments may not change hands for management agreements. Under leases, the lessee is responsible for the property; under a management agreement, the owner retains responsibility.</p>	<p>2-12 months.</p>	<p>Negotiable between lessee and lessor.</p> <p>With a lease, could require maintenance costs of land including taxes, depending on terms of the lease.</p> <p>Legal expenses of drafting an agreement.</p>	<p>Only as strong as the terms and length of the lease or agreement and the intentions of the landowner.</p>	<p>Use restricted to terms negotiated between lessor and lessee.</p>	<p>Foundation partners, land and, for lease conservation lessee(s).</p>
<p>Voluntary dedication and voluntary payment in lieu of dedication</p> <p><i>Conservation as part of new subdivisions</i></p>	<p>Request by local government for a developer to voluntarily donate land for open space or pay a fee as an incentive for zoning approval. Payment may be used to fund other land conservation activities (limited by state laws regarding proffers).</p>	<p>Speed determined by will of local governments to request such conditions.</p>	<p>Administrative costs.</p> <p>Land maintenance costs including taxes for developer or residents of subdivision.</p> <p>Legal expenses of drafting an agreement.</p>	<p>Potentially strong protection for land dedicated or purchased through payment.</p>	<p>Local government policy may prescribe how such land or cash may be used.</p>	<p>Local government with public</p>

Figure 3.4 Techniques for Land Conservation (page 7 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Agricultural and Forestal Districts</p> <p><i>Districts for easier farming</i></p>	<p>Use-value taxation program for forestal and agricultural land in specific districts.</p> <p>Also protects land owner from farm-related nuisance claims and exercise of eminent domain.</p>	<p>Six months or more. Requires minimum acreage (usually involves more than one owner) and agreement by local government.</p>	<p>Administrative costs for local government.</p>	<p>Moderate. Fairly strong through the life of the district, but must be renewed every five to ten years. An owner who stops participating in a district may face penalties.</p>	<p>Limits property to agricultural and forestal uses.¹¹</p>	<p>Property owner or local government</p>
<p>Exercise of state and federal regulations for ecologically sensitive areas</p> <p><i>Relying upon available regulations</i></p>	<p>A wide variety of state and federal regulation can be used to support land conservation if enforced.</p> <p>Generally for wetlands and habitat for endangered species.</p>	<p>Usually immediate, but may depend upon the regulation. Habitat conservation plans may take time to prepare, but a moratorium on further development is often imposed until negotiations are complete.</p>	<p>Administrative costs.</p>	<p>Strong but protection technique only available for use in sensitive area.</p>	<p>Restriction depends upon terms of regulation.</p>	<p>Federal and state government participate</p>
<p>Land use and transportation planning</p> <p><i>Land conservation through local planning</i></p>	<p>Land use planning (zoning and subdivision review) and transportation planning can be used to decrease development pressures on land.</p>	<p>May take years to encourage local governments to require consideration of impacts on battlefields and other resources and to call for their protection.</p>	<p>Administrative costs for local government.</p>	<p>As strong as the will of local government, however, cannot remove all reasonable use of a property. Not permanent protection.</p>	<p>Depends upon the type of implementation tool employed (i.e., zoning).</p>	<p>Local government with public participation</p>

Use is limited to agriculture but does not specify type of agriculture. Farm owner may subdivide land for use by family only.

**Figure 3.4 Techniques for Land Conservation (page 8 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technique
<p>Cluster zoning/ Planned Unit Development</p> <p><i>Conservation as a component of subdivision</i></p>	<p>Allows conservation by clustering subdivisions into small areas and dedicating the remainder of the property as open space. A PUD provision allows clustering for large mixed use developments.¹²</p>	<p>Up to one or more years to gain approval from all necessary planning and zoning boards and governing bodies.</p>	<p>Administrative cost for local government. Extra design costs for developer, although costs may be recaptured in faster sales and higher prices.</p>	<p>Good planning concept for land conservation, but not first choice for protecting high priority parcels of core battlefield land. This tool is stronger if it requires permanent dedication of open space, but is still limited by the location and extent of the development.</p>	<p>Varies with local government requirements on protecting open space.</p>	<p>Property owners (developers) local government</p>
<p>Density bonuses</p> <p><i>Offering benefits to developers for concentrating new development</i></p>	<p>Local governments allow increased density in a subdivision in return for protection of some of the property as open space.</p>	<p>Local lobbying for government to offer bonuses for higher density development may take years.</p>	<p>Administrative cost for local government. Extra design costs for developer, although costs may be recaptured in faster sales and higher prices.</p>	<p>Good planning concept for land conservation, but not first choice for protecting high priority parcels of core battlefield land. This tool is stronger if it requires permanent dedication of open space, but still limited by the location of the development. Results in additional development on some land in exchange for protection of other lands. Best if bonuses are banked to protect large areas of significant battlefield land. However, the transfer of development rights is currently not permitted in Virginia.</p>	<p>Varies with local government requirements on protecting open space.</p>	<p>Property owners (developers) local government</p>

accomplishes land preservation, but could involve a subdivision or other development on battlefield land.

Figure 3.4 Techniques for Land Conservation (page 9 of 9)
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Action	Definition	Speed of Use	Expenses	Relative Strength of Protection	Degree of Restriction	Who Controls the Technology
<p>Conservation subdivisions</p> <p><i>Clustering to protect key features</i></p>	<p>Similar to clustered development with emphasis on conserving specified natural, cultural, and historic features.</p>	<p>Local lobbying for government to permit and encourage such development may take years.</p>	<p>Administrative cost for local government. Extra design costs for developer.</p>	<p>Good planning concept for land conservation, but not first choice for protecting high priority parcels of core battlefield land. Strong if it requires permanent dedication of open space, but a portion of the parcel is still developed. Typically offers smaller lot size than the required minimum and greater dedicated open space.</p>	<p>Usually involves permanent prohibition of subdivision and/or protection of shared open space, if any.</p>	<p>Property owners (developed local government) May be used in certain situations</p>
<p>Large lot zoning</p> <p><i>Limiting development through zoning</i></p>	<p>A zoning category for conservation requiring specified minimum lot sizes. (Usually 25-40 acre minimum)</p>	<p>Up to a year to revise zoning ordinance and zoning map. May require time for amendment to comprehensive plan.</p>	<p>Administrative costs for local government.</p>	<p>Not strong because it is reversible by a zoning change, or can be undermined by variance, but it can support agriculture and slow loss of land through subdivision.</p>	<p>Small lot subdivision would require zoning amendment.</p>	<p>Local government with public trusts.</p>
<p>Recognition and certification program</p> <p><i>Using prestige, public recognition, and raised awareness to encourage conservation</i></p>	<p>Honorary distinctions conferred for property owners who excel in conservation activities or for properties that exhibit historical and ecological significance. Examples include the state and federal lists for historic resources and scenic byway and river designations. New local programs may be created with similar benefits and results.</p>	<p>Need lead time to create program; once program is set up and the public is aware of the program, speed would be determined by the time needed for application preparation, review and designation.</p>	<p>Administrative costs, publicity, and fabrication of signage. Some monitoring costs, as organizations with such programs typically visit the property for friendly consultation.</p>	<p>Little strength, but educates owners about other possibilities.</p>	<p>No restriction.</p>	<p>Foundations, partners, or trusts.</p>

Role of the Foundation and Partners in Using the Land Preservation Toolbox

Implementation of the battlefield plans is to be accomplished by the Foundation, partners, and others as circumstances dictate. The Foundation and partners may collaborate in some instances or act independently in others. Partners may seek funds and technical assistance from the Foundation.

Many of the stakeholders who participated in the preparation of the Management Plan are potential partners in its implementation and specifically in battlefield preservation. Such key stakeholders/partners include the NPS, the Commonwealth of Virginia, and the public-trust battlefield owners, just to name a few. In addition, the Foundation should continually seek to expand its complement of partners to help implement the Management Plan. These might include local governments, landowners, and local heritage and conservation organizations.

The District has already enjoyed many successful partnerships in protecting battlefield land. New partnerships to explore for land preservation might include:

- American Farmland Trust -- www.farmland.org
- Nature Conservancy -- www.tnc.org
- Ruritan Clubs and other service clubs in the District -- www.ruritan.qpg.com (Ruritan National Website)
- Headwaters Soil & Water Conservation District – va.nacdnet.org/headwaters
- Lord Fairfax Soil & Water Conservation District – www.state.va.us/~dcr/sw/swcdlist.htm
- Mountain Soil & Water Conservation District – www.state.va.us/~dcr/sw/swcdlist.htm
- Shenandoah Valley Soil & Water Conservation District – www.state.va.us/~dcr/sw/swcdlist.htm
- The Wilderness Society – www.wilderness.org
- Trust for Public Land – www.tpl.org
- Virginia Environmental Endowment – www.cvco.org/vee
- Virginia Land Conservation Fund – www.state.va.us/~dcr/prr/vlcfgrnt.htm
- Virginia Polytechnic Institute, Cooperative Extension System – www.ext.vt.edu

3.5 Actions for Battlefield and Resource Protection

Protecting battlefields is an on-going mission of the highest priority. The Foundation's Resource Protection Committee should initiate and oversee the actions described below. It may be useful to form subcommittees as the work requires.

- **Develop a list of parcels to be protected in the District.** The Foundation should apply the Land Acquisition Priority Ranking System to set priorities and goals for land protection on all ten battlefields, and to develop and maintain a list of preservation priorities so that it can act as parcels and funding become available — *Foundation.*
- **Protect battlefields as opportunities and funds are available.** The Foundation should work with its partners and employ the land preservation toolbox to protect battlefield land — *Foundation/Partners.*
- **Prepare and update individual battlefield preservation plans for each of the ten District battlefields.** One or more of these should be undertaken in the Foundation's first year — *Foundation/Partners.*

This function is likely to require a sub-committee to:

- Select consultants and prepare the plan(s) with cluster partners, landowners, and other stakeholders;
 - Maintain consistent policies and approaches from one battlefield plan to the next; and
 - Review interpretive plans, particularly as they may affect battlefields.
- **Secure funds for battlefield preservation.** This task includes developing partnerships with federal, state, and local governments and the private sector to secure funding or loans to protect land as opportunities arise — *Foundation/Partners.*
 - **Monitor the policies and decisions of the District's local governments, the Commonwealth, and the federal government that affect land use in the District; encourage the adoption of effective conservation strategies as part of local plans and ordinances.** In cooperation with the Foundation's partners, prepare a public policy analysis that expands on the information gathered for the Environmental Impact Statement that accompanied the Management Plan. It should recommend policy changes that would be beneficial and feasible as well as implementation actions to accomplish these recommendations — *Foundation.*

In its first year, the Resource Protection Committee is expected to focus on the following:

- 1. Funding and transactions to protect battlefield lands;***
- 2. Supporting the NPS in establishing its presence and role at Cedar Creek;***
- 3. Beginning preparation of individual battlefield preservation plans by:***
 - Convening “conversational meetings” with stakeholders at all ten battlefields to scope out the level of interest, training needs, available resources, a process, and other issues; and***
 - Negotiating priority order for undertaking the battlefield plans based on level of interest, funding, and other issues.***

3.6 AGRICULTURAL LANDS

As stated in the Management Plan, agriculture has historically been the basis for the Valley’s economy. By helping to keep farming an economically viable industry, the Foundation can help to preserve both battlefields and the rural character of the District.

Role of the Foundation and Partners

The Resource Protection Committee or an agricultural subcommittee should undertake the actions described in this section. Early on, the subcommittee’s role should be to:

- Assess agricultural interests and needs in the District;
- Get to know the community of farmers and agricultural advisers in the Valley; and
- Let that community know of the Management Plan and the Foundation’s future work.

The following organizations are key partners in working to protect agriculture in the District:

- **The Virginia Tech Cooperative Extension System:** The staff of this program can explain programs and services underway in the Valley, introduce the Foundation to many of the key

leaders involved in the remainder of this list, and assist the Foundation in shaping programs and policies. Virginia Tech staff work closely with local Cooperative Extension staff.

- **Soil and water conservation districts:** Soil and water conservation districts are units of local government governed by an elected board. In the Shenandoah Valley the boundaries of these districts coincide with county boundaries. These districts often cooperate with counties, especially in providing reviews of soil erosion plans associated with development, and other information concerning soil and water issues. They are also able to receive conservation easements, although few do so.
- **Natural Resources Conservation Service (NRCS):** The NRCS is a federal agency that operates many of its programs through its involvement in soil and water conservation districts. The staff for either or both often advises farmers about improving farm operations.
- **Resource Conservation and Development organizations (RC&Ds):** RC&Ds are nonprofit organizations working with multiple soil and water conservation districts. Funded by the NRCS from a national program, and often staffed by NRCS personnel, these organizations undertake a wide variety of support programs involving a high degree of volunteer effort. For example, the Lord Fairfax RC&D has undertaken stream cleanup projects on Opequon Creek. RC&Ds may also be able to receive conservation easements and may prove to be valuable partners in undertaking battlefield protection projects. There are four RC&Ds with jurisdiction in the District: Headwaters, Lord Fairfax, Mountain, and Shenandoah Valley.
- **Local Cooperative Extension Service:** Cooperative Extension Service agents are located in each county, and represent one of the longest-running federal-state-local partnerships in the nation. All levels of government share the costs of the program. These agents develop expertise in farming, local community development, home economics, and other aspects of farm and community needs; many Valley residents will know them as facilitators of the 4-H program. They are typically rooted in their communities and can serve as guides to others in each county with whom the Foundation might work.
- **The Virginia Farm Bureau:** The Farm Bureau represents farmer's interests throughout the Commonwealth. The Foundation could use local Farm Bureau representatives as liaisons with local farmers.
- **Ruritan Clubs:** Ruritan is a nonprofit, volunteer service organization that works locally with schools, churches, 4-H, and other service organizations. Area farmers are very active in the District's Ruritan clubs.

- **Farmland Protection Program (USDA):** Established by the 1996 Farm Bill, this program provides funding for farmland easement acquisition.
- **American Farmland Trust:** The American Farmland Trust (AFT) is a national organization that works with farmers and community groups to preserve farmland through easements, public policy advocacy, and a variety of other means. An AFT field office has just been established in Culpeper.

Initial Actions

The Resource Protection Committee should form an Agriculture Subcommittee consisting of Foundation trustees, representatives of agriculture-related interest groups and agencies, and farmers themselves. This subcommittee and Foundation staff would work with partners to:

- **Develop educational program for farm advisors and owners — *Partners*.**
- **Conduct advisory meetings with farm advisory groups, farmers, and farm owners** to explore current agricultural issues in the Valley and how the Foundation might assist in efforts to keep farming a viable industry in the District. These meetings should be especially sensitive to real or perceived rifts between the agricultural and non-agricultural communities and develop ways to keep the two in harmony — ***Foundation/Partners***.
- **Pursue the creation of state legislation that enables local jurisdictions to purchase conservation easements on battlefield land that is already protected through Agricultural and Forestal Districts — *Partners*.**
- **Encourage Virginia's use of federal funds for the purchase of agricultural conservation easements to be applied on battlefields — *Partners*.**
- **Undertake a pilot program to prepare one county or multi-county agricultural development plan(s)** that identifies local programs (or gaps in programs) to support the business of agriculture and the preservation of farmland. This could be a key first step in exploring with stakeholders all possible options for local support of the farm economy and farmland base. Stakeholders should include farmers, farm advisors, local governments and economic development officials who have the power to implement programs that support agricultural businesses — ***Partners***.

In its first year, the agriculture subcommittee is expected to focus on the following:

- 1. Conversations with Valley farmers, farm owners, and farm advisors about their needs and issues, including a workshop predominantly organized by partners; and***
- 2. Conversations with Cooperative Extension Service officials and other agricultural officials at the state and federal levels about available policies for protecting agricultural lands in the Valley and their usage and effectiveness.***

3.7 HISTORIC PRESERVATION

The Management Plan states that the preservation of Civil War-related resources is an important activity after the preservation of battlefield core and study areas.

The District continues to exhibit much of the rural character that served as the backdrop for the Civil War. The creation of the District is an attempt to maintain this character by preserving battlefields and the surrounding landscape of houses, barns, farmsteads, mills, bridges, fence lines, and other character-defining features. Figure 3.7-1 is a survey of what preservation policies, ordinances, and programs already exist in the District. The figure also illustrates what gaps exist and need to be filled.

Initial Actions

In time the Resource Protection Committee should form a subcommittee to address historic preservation and community design issues. This subcommittee should include community residents and officials, representatives of preservation organizations, and the owners of historic resources. Or the Foundation might wish to partner with one or more existing preservation organizations and encourage them to undertake the following action agenda:

- **Encourage public plans to address historic preservation needs.** This would include the development of preservation plans, designating local historic districts, and undertaking preservation-related ordinances as an aspect of community revitalization — ***Foundation/Partners.***

**Figure 3.7-1 Historic Preservation Techniques in Use in the District
SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**

County/ City or Town	Historic Resources Survey ¹	Preservation Plan	National Register Listings/ Districts	Historic District or Other Overlay Zoning	State Scenic Byways ³	Historic Overlay Corridor	Battlefield Preservation Plan
Frederick County	✓✓✓		9/1	Pending ²			✓
Winchester	✓		4	✓			✓
Clarke County	✓		24/5	✓		✓	
Berryville	✓		8/2	✓			
Warren County	✓		4/2	✓	R		
Front Royal	✓		9	✓ (3)		✓	
Shenandoah County	✓✓✓		11/2		✓		✓
New Market	✓		1/1				✓
Strasburg	✓		2/1	✓			✓
Page County	✓✓		7	✓			
Luray	✓		11/1	✓			
Rockingham County	✓		13/4				✓
Harrisonburg			2				
Augusta County	✓		40/2	✓	✓	✓	
Staunton	✓		3	✓			
Waynesboro			1				
Highland County	✓		0/1		R		✓
Monterey			2	✓			

Source: Shenandoah Valley Battlefields National Historic District Management Plan Technical Supplement and the National Register Information System of the National Register of Historic Places, National Park Service, US Department of the Interior.

¹ multiple ✓'s denote multiple updates of surveys

² Frederick County has a voluntary historic overlay zone that has not been implemented

³ R indicates byway designations recommended but not yet accomplished

- **Fulfill responsibilities outlined in the programmatic agreement for project review under Section 106 of the National Historic Preservation Act of 1966, as amended—Foundation.**
- **Inventory related resources and prepare applications for listing resources in the Virginia Landmarks Register and the National Register of Historic Places —Partners.**
- **Develop informational brochure for property owners on the importance of preserving historic resources, especially those from the Civil War. Based on work**

completed by the Valley Conservation Council and the “Preservation Toolbox” developed by the Virginia Department of Historic Resources, this brochure would include information on whom owners should contact (at local, state, and federal levels) for help in preserving their resources and should be distributed to owners of significant resources— *Partners*.

- **Promote the purchase/donation of preservation (façade) easements on resources significant to the Civil War — *Partners*.**
- **Support District partners in procuring state and federal grants, tax credits, and loans for preservation-oriented projects.** This could include rehabilitation projects, museum and historic site development, education programs, design assistance, easement administration, and other preservation-oriented activities — *Partners*.
- **Write a brochure explaining historic preservation tax credits to private owners and investors — *Partners*.**

In its first year, the Historic Preservation and Community Design subcommittee is expected to focus on the following historic preservation activities:

- 1. Establish contacts with communities and other key partners who will promote preservation efforts in the District to find out how the Foundation might play a supporting role to assist in their work; and***
- 2. Establish an agenda for short- and long-term actions with key preservation partners, including identifying funds to support the agenda.***

Potential Preservation Partners and Contacts

In most instances general preservation efforts (especially with non-Civil War related resources) should be undertaken by partners and supported by the Foundation as appropriate. The following is a list of organizations and agencies that already or might play a role in preserving the District’s historic resources and be partners to the Foundation:

Local

- City and Town Councils and Planning Commissions/Departments
- County Boards of Supervisors and Planning Commissions/Departments
- Town of Berryville Architectural Review Board
- Clarke County Historic Preservation Commission
- Frederick County Historic Resources Advisory Board
- City of Staunton Historic Preservation Commission
- City of Winchester Board of Architectural Review

- Citizens for Downtown (Harrisonburg)
- Common Ground (Harrisonburg)
- Community Consensus Coalition
- Friends of the North Fork of the Shenandoah River
- Friends of the North River
- Friends of the Valley
- Greener Harrisonburg
- Kernstown Battlefield Association
- Shenandoah Preservation League
- Preservation of Historic Winchester, Inc.
- Shenandoah Valley Heritage Center
- The Society of Port Republic Preservationists
- Clarke County Historical Association Museum and Archive
- The Highland Historical Society
- Historic Staunton Foundation
- Waynesboro Heritage Foundation
- Winchester-Frederick County Historical Society

Regional

- Central Shenandoah Planning District Commission
- Headwaters Soil & Water Conservation District
- Lord Fairfax Planning District Commission
- Lord Fairfax Soil & Water Conservation District
- Piedmont Environmental Council (for Clarke County)
- Potomac Appalachian Trail Club
- Shenandoah Valley Pure Water 2000 Forum
- Valley Conservation Council

State

- Association for the Preservation of Virginia Antiquities
- Land Trust of Virginia
- Northern Virginia Conservation Trust
- Preservation Alliance of Virginia
- Virginia Land Conservation Foundation and Fund
- Virginia Department of Historic Resources with its Winchester Regional Office
- Virginia Outdoors Foundation
- The Wildlife Center of Virginia

National

- Advisory Council on Historic Preservation (for Section 106 review at federal level)
- National Park Service:
 - Heritage Preservation Services
 - National Register of Historic Places
 - Historic American Buildings Survey/Historic American Engineering Record
- Civil War Preservation Trust
- National Trust for Historic Preservation
- Note: see other organizations listed in other sections of this chapter, which can assist with preservation of the landscape of the District.

Criteria for Targeting Preservation of Related Resources and Historic Sites

Invariably the Foundation will be asked to intervene or participate in the preservation of non-battlefield resources, e.g., standing structures. Deciding when to accept the invitation and at what level of involvement will be an on-going challenge. The criteria listed in Figure 3.7-2 should be used to assess the importance of the resource and help the Foundation decide on an appropriate level of involvement. The criteria are listed in descending order of importance and should apply to resources that existed during the Civil War.

Once it has been determined that a resource warrants the Foundation's involvement, it will have to further decide what level of involvement is necessary and appropriate. The Foundation will also need to understand the level of public benefit from and support for preserving the resource. The Foundation will also need to determine if it or its partners will take the lead on a project. Whenever possible, partners should take the lead.

3.8 NATURAL AND RECREATIONAL RESOURCES

As the Management Plan states, the same forces threatening battlefields, cultural landscapes, and communities also threaten open space, wildlife habitat, rivers, and other natural resources. The natural heritage of the District is important to understanding the Valley and its Civil War heritage. For both visitors and residents, the loss of this heritage reduces the perception of the "specialness" of the District.

Figure 3.7-2 Criteria for Identifying Civil War-related Resources in need of Preservation

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

1. "Landmark" buildings, structure, or other resources that played a particular role in the course of a battle.
2. A building, structure, or other resource within the core area of a battlefield that retains its general integrity to the Civil War.
3. A building, structure, or other resource within the study area of a battlefield that retains its general integrity to the Civil War.
4. A building, structure, or other resource within the core or study area of a battlefield that may have lost a significant portion of its integrity, but still occupies the site of a structure present at the time of the battle.
5. A building, structure, site (e.g. an area where an important incident occurred), or other resource dating from the Civil War and visible from within the core or study area of a battlefield.
6. A building, structure, or other resource that retains its general integrity to the Civil War and is associated with a Civil War event outside of the study area of a battlefield.
7. A building, structure, or other resource that retains its general integrity to the Civil War and that was specifically mentioned (and can be independently identified) in primary accounts of participants in the Civil War.
8. A Civil War-related building, structure, or other resource within a landscape context that also retains its general integrity.
9. A Civil War-related building, structure, or other resource within a landscape context that has lost much of its general integrity, or a building, structure or other resource present during the Civil War.

The Foundation should work with local jurisdictions to ensure sufficient recreational opportunities are provided for area residents, assuring a continued quality of life and reducing demands for active recreational use of the battlefields. It should also promote recreational activities that support visitation to battlefields and sites, such as systems of hiking trails.

Initial Actions

The Resource Protection Committee should investigate the following actions:

- **Where related to other District programs, allow recreational and natural resource projects to be eligible for Foundation grant funding.** The guidelines should stress that the Foundation would not fund solely recreational proposals that do not relate to its core mission but

that recreational projects that support interpretation and visitation will be considered — **Foundation.**

- **Implement the Management Plan's proposed north-south trail linking the battlefields and towns and joining the east-west Tuscarora Trail.** Investigate recruiting the NPS Rivers and Trails Conservation Assistance program (RTCA) and undertake necessary steps as appropriate — **Foundation.**
- **Study and plan for bicycle use in the District and associated parking needs at the battlefields and elsewhere in the towns and throughout the District.** The Foundation may accomplish this via a direct contract for a District-wide study, or it may become a participant in a pilot project in one or multiple counties — **Foundation/Partners.**
- **Undertake pilot project(s) for one county-wide or multi-county regional recreation plan,** with the Foundation acting as a stakeholder and providing a seed grant and/or by assisting the chosen jurisdiction in seeking adequate state, federal, or private funding. (The RTCA program may be able to supply technical assistance, an indication of the independent role the NPS may be able to bring in this area as a stakeholder) — **Partners.**
- **Assist counties and other jurisdictions in qualifying for funding from the “stateside” Land and Water Conservation Fund.** This will ensure that state funds are being devoted as much as possible to stimulate local and state implementation of battlefield plans — **Partners.**

In its first year, the Resource Protection Committee should address the protection of natural resources and recreational planning issues primarily through battlefield plans. It may also:

- 1. Ensure that guidelines for Foundation grants allow locally proposed projects affecting recreational and natural resources to apply for grant funding under “multiple objective” criteria.***
- 2. Include a section in the Foundation's annual report on the state of natural and recreational resources in the area.***

Partners and Contacts

The list of potential local-level partners for natural resource conservation is largely the same as the list for historic preservation, in Section 3.7 above. At the regional, state, and federal levels the following groups may help support the Foundation's efforts:

Regional

- Piedmont Environmental Council (for Clarke County)
- Potomac Appalachian Trail Club
- Valley Conservation Council

State

- Virginia Department of Transportation (VDOT)
- Virginia Department of Conservation and Recreation
- Virginia Department of Forestry
- Commonwealth's Riparian Buffer Implementation Program

National

- The Nature Conservancy
- Others as appropriate

3.9 COMMUNITY PLANNING AND DESIGN

The Management Plan directs the Foundation to promote community planning and design policies and programs that conserve the District's historic character. There are several specific concerns the Foundation should consider:

- Erosion of a distinctive Shenandoah Valley or regional community character;
- Reconstruction and construction of major roads in the District such as I-81 or VA Rte. 37 and the impacts this will have on the District's traditional character; and
- Reconstruction or realignment of historic routes in the District, which affects them as historic resources and causes secondary impacts to the overall rural and village landscapes.

The Role of the Foundation

The Management Plan directs the Foundation to encourage local jurisdictions and private owners to protect the special character and charm of the District's communities as a part of its natural, cultural, and historic resources. However, the Foundation is expected to be a supporting partner to improve community design. The lead remains with the counties and towns of the District.

Thus, the Foundation could provide planning and technical assistance to counties and towns on an "as-requested" basis, and as resources are available. In general, the Foundation's assistance over time might include guidance for new construction, streetscapes, signage, circulation, and other design decisions affecting the "public domain" portions of District communities.

Local Efforts for Community Planning and Design

Figure 3.9 illustrates the current state of basic planning in the District and the use of regulatory techniques that encourage high-quality community design and appearance.

Initial Actions

The Foundation's Resource Protection Committee, acting through a historic preservation and community design subcommittee, should consider undertaking the actions described below.

The Foundation should consider establishing a grants program to encourage community planning initiatives. An initial focus could include the following:

- **Where related to other District programs, allow community planning and design projects to be eligible for Foundation grant funding.** The guidelines should stress that the Foundation would not fund solely proposals that do not relate to its core mission but that projects that support interpretation and visitation will be considered — *Foundation*.
- **Support a pilot program to inventory community design policies, assets, and issues in one town — *Foundation/Partners*.**

Figure 3.9 Community Design Planning and Regulatory Techniques in Use in the District

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

✓ = Community has legislation addressing the issue; no qualitative assessment is implied.

County/City or Town	Date of Comprehensive Plan	On-premise Sign Control	Billboard Prohibition	Overlay Corridors for Roads to Historic Districts*	Public Service Limits
Frederick County	1994	✓	Height limit		✓
Winchester	1991		✓		
Clarke County	1994		✓	✓	
Berryville			✓		Annex plan
Warren County	1997	✓	✓		
Front Royal	1997			✓	
Shenandoah County	1991	✓	✓		
New Market	1990				
Strasburg	1991				
Page County	1992				✓
Luray	1993				
Rockingham County	1993				
Harrisonburg					
Augusta County	1994*			✓	
Staunton	1996		✓		
Waynesboro					
Highland County	1999				
Monterey					

Source: Shenandoah Valley Battlefields National Historic District Management Plan Technical Supplement, 2000

* Being updated

- **Support a pilot program to re-design the commercial construction and landscaping around one interchange on I-81.** Funding for this program should also be sought from the Virginia Department of Transportation (VDOT) as a part of the mitigation for the reconstruction of the highway — **Foundation/Partners.**
- **Identify “byways” for Virginia and federal designation — Partners**
- **Conduct a pilot program to survey historic routes in one county; propose improved VDOT, county, and town maintenance practices.** Address the needs of bicyclists and pedestrians and identify “byways” for Virginia and federal designation. Funding for this program should be sought by the Foundation from VDOT’s TEA-21 federal funding — **Foundation.**

- **Develop a pilot training program in community design for community public officials (appointed and elected), bankers, realtors, and citizen activists.** Partners proposing such programs should be encouraged to consider whether to focus on a town, cluster, county, or the District as a whole — *Partners*.
- **Study of the financial returns to communities investing in preservation and aesthetic improvements — *Foundation*.**
- **Write a brochure on the benefits, effective techniques, and Valley examples of good community design — *Partners*.**
- **Sponsor community design plans addressing land use policies, sign controls, design guidelines, streetscape, and other public domain elements** that address land use policies, sign controls, design guidelines, streetscape issues, public art, and historic preservation and adaptive use opportunities for community and economic development — *Foundation/Partners*.
- **Fund an inventory of the details of design policies in place in each town and county — *Partners*.**

Partners and Contacts

The list of partners for community planning and design is largely the same as the list for historic preservation, in Section 3.7 above, at the local levels. Local government participation is particularly important. At the regional, state, and federal levels the following groups may help support the Foundation's efforts:

Regional

- Central Shenandoah Planning District Commission — www.cspdc.org
- Lord Fairfax Planning District Commission — www.lfpdc7.state.va.us/
- The Valley Conservation Council — www.valleyconservation.org

State

- The University of Virginia's School of Architecture — minerva.acc.Virginia.EDU/~arch/
- The Virginia Chapter of the American Planning Association — www.vaplanning.org
- The Virginia Main Street Program — www.dhcd.vipnet.org/cd/crd/msp/mspindex.htm

National

- The American Planning Association — www.planning.org
- The Conservation Fund — www.conservationfund.org
- Glynwood Center — www.glynwood.org
- The Mayors' Institute on City Design — www.arts.endow.gov/partner/Mayors2.html
- The National Trust for Historic Preservation's National Main Street Center — www.mainst.org
- The National Trust for Historic Preservation's Rural Heritage Program — www.ruralheritage.org
- The American Institute of Architects' Rural/Urban Design Assistance Team Program — www.e-architect.com/pia/rudat/home2.asp

CHAPTER 4

INTERPRETATION

4.1 INTRODUCTION

4.2 THE ROLE OF THE FOUNDATION AND PARTNERS IN INTERPRETATION

4.3 INTERPRETIVE THEMES

4.4 INTERPRETIVE SITES AND FACILITIES

4.5 THE DISTRICT-WIDE INTERPRETIVE PLAN

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4.7 INITIAL ACTIONS FOR INTERPRETATION

4.8 EDUCATIONAL PROGRAMS

CHAPTER 4 INTERPRETATION

4.1 INTRODUCTION

The Shenandoah Valley Battlefields Foundation (Foundation) has a clear mandate to develop and enhance Civil War interpretation and educational programs in the Shenandoah Valley Battlefields National Historic District (District). The District's enabling legislation states that "the preservation and interpretation of [sites of several key Civil War battles] would make a vital contribution to the understanding of the heritage of the United States," and requires that the Management Plan include "provisions for implementing a continuing program of interpretation and visitor education concerning the resources and values of the District."

The Management Plan identifies key interpretive themes and describes desired visitor experiences for the District. In particular, the Foundation's directive is to provide balanced interpretation of the Civil War history in the Shenandoah Valley. It must include the military history, the role of the Valley in the conflict, and civilian life in the District during the War.

Interpretation should be available at a variety of sites and through a variety of facilities and media. These facilities should be the primary contact points for visitors to experience the stories behind the battlefields and related resources. Through a coordinated system of visitor reception facilities, wayside exhibits, independent media (books, audio tapes, videos, etc.), and education programs, visitors should be provided the opportunity to understand the events, results, and meanings related to the Civil War in the Valley.

This chapter develops these ideas in greater detail, focusing first on interpretation and wayfinding, and then on educational programming.

4.2 THE ROLE OF THE FOUNDATION AND PARTNERS IN INTERPRETATION

The Foundation will play a key role in the interpretation of the District, but will not itself interpret any site. As described in the Management Plan, the Foundation will:

- Work collaboratively with partners to design a District-wide interpretive plan;
- Support the development of five Civil War orientation centers, to be operated by independent organizations and to be planned through the District-wide interpretive plan;
- Support existing institutions—on a competitive basis with grants and technical assistance—as they adapt the District-wide interpretive plan to their individual situations (see Figure 4.2);
- Support new sites identified in the interpretive plan with funding and technical expertise, on a competitive basis with existing sites;
- Create a District-wide wayfinding system of entry, directional, and interpretive signs, coordinated in both content and design with District-wide interpretive materials, including a Website, brochures, driving tour guides, and other publications. The Foundation will both develop such products directly and support others in developing them;
- In partnership with primary, secondary, college-level, and continuing education programs and institutions design and implement an educational program intended to use the District and its Civil War resources as instructional tools; and
- Support a limited number of appropriate academic research projects to address needs identified in the District-wide interpretive plan.

Clearly, partners are key to accomplishing the Foundation’s interpretive mission. Investigation during the preparation of the Management Plan revealed that there are more than 30 interpreting institutions, ranging from battlefields to historical societies and nonprofit museums to for-profit attractions. Figure 4.2 lists these institutions.

Figure 4.2 Interpretive Partners (1 of 3)**SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT**

	Institution	Location	Interpretive Focus
1	Belle Boyd Cottage	Front Royal	The story of Belle Boyd, espionage, and Civil War history using a house museum
2	Belle Grove Plantation	Middletown	The story of the plantation (house, outbuildings, and grounds, circa 1794) and the family. Interpretation features exhibits, artifacts, and period furniture.
3	The Cavalry Museum	New Market	The history of the use of cavalries in war from Jamestown in the 17 th century to the Vietnam War of the 20 th century. The main venue is the Major Christian Shirley House. Interpretation features artifacts, exhibits, and model horses.
4	Cedar Creek Battlefield Visitor Center	Middletown	The story of the battle of Cedar Creek. The main venue is the visitor center and bookshop. Interpretation features exhibits, reenactments, driving tours, guided tours, and brochures.
5	Clarke County Historical Association Museum and Archive	Berryville	The Civil War battles in Berryville, Clarke County, and stories of local soldiers, with information on Mosby. Exhibits occupy the old Clarke County Courthouse. The museum and archive also produces a journal.
6	Crystal Cave Museum	Strasburg	Cave geology and historic use of caverns, including use by Civil War soldiers. The main venues are the cave with a one-quarter mile underground walking path and the exhibit building.
7	Historic Staunton Foundation	Staunton	Staunton architecture, focusing on the historic districts including Jubal Early's headquarters. Walking tours and a book on local architecture have been produced.
8	Kernstown Battlefield Association	Winchester	First and second battles of Kernstown, focusing on the Grim Farm (Pritchard House and various outbuildings) with a pull-off area and interpretive sign.
9	Kurtz Cultural Center	Winchester	The heritage of the communities of the northern Shenandoah Valley, including the Civil War. Changing exhibits occupy the Civil War Information Center.
10	Old Courthouse Civil War Museum	Winchester	Military artifacts, especially artillery will be exhibited in the Old Winchester County Courthouse. (pending)
11	Jackson's Headquarters Museum	Elkton	The Miller-Kite House, Jackson's headquarters prior to the Battle of McDowell, is open as a museum.
12	Museum of American Presidents	Strasburg	American Presidents using exhibits and a hands-on children's room.

Figure 4.2 Interpretive Partners (2 of 3)

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

	Institution	Location	Interpretive Focus
13	New Market Battlefield State Historical Park and the Hall of Valor Civil War Museum	New Market	The battle of New Market and the role VMI cadets played in the battle. The museum includes exhibits, a theater, and a conference room and the site has interpretive trails, a historic farm, and commemorative markers. Reenactments are also held.
14	New Market Battlefield Civil War Military Museum	New Market	United States military history from the Revolutionary War to Persian Gulf War exhibited in a museum. The grounds occupy a portion of New Market battlefield.
15	The Plumb House	Waynesboro	The Plumb House and its inhabitants, plus the Battle of Waynesboro using the house museum (under development).
16	Reuel B. Pritchett Museum	Bridgewater	General history museum, teaching museum, and educational wing of Bridgewater College. The museum displays more than 10,000 items.
17	Shenandoah Valley Heritage Center	Dayton	Valley Heritage with interpretation of General Jackson's Campaign. The center consists of a museum and library.
18	Stone House Foundation	Stephens City	Lives and times of the Grove family during the Civil War era with a visitor center and three historic properties (under development).
19	Stonewall Jackson's Headquarters Museum	Winchester	General Jackson's use of the house from November 6, 1861 to March 11, 1862, and the nearby battlefields. Exhibits include period and original furniture and artifacts.
20	Stonewall Jackson Museum at Hupp's Hill	Strasburg	General Jackson's 1862 Campaign and selected battles of 1864 and the use of caves during Civil War. The main venues are the museum, the caverns, Confederate-built earthworks, and walking trails. Interpretation features living history and outdoor exhibits
21	Strasburg Museum	Strasburg	Local heritage and limited Civil War heritage. Interpretation features artifacts and markers for soldiers' cemeteries.
22	Frank Kemper House, The Society of Port Republic Preservationists, Inc.	Port Republic	The battle of Port Republic, the surrounding area, the last days of Jackson's campaign, and Turner Ashby.

Figure 4.2 Interpretive Partners (3 of 3)

SHENANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

	Institution	Location	Interpretive Focus
23	Warren Rifles Confederate Museum	Front Royal	Confederate soldiers; Belle Boyd, Robert E. Lee, General Jackson and his 1862 Campaign, and John S. Mosby. Exhibits feature artifacts, battle flags, artillery, cavalry, infantry, clothing, pictures, arms, and brochures.

National Civil War Interpreters

24	Civil War Preservation Trust	Arlington, VA	In addition to the mission of preserving battlefield lands, the Trust also promotes educational programs and heritage tourism initiatives. Interpretation in the district focuses on Port Republic, Fisher’s Hill, etc.
25	Virginia Civil War Trails Program	Richmond, VA	The program offers interpretation on the Civil War in Virginia. It collaborates with tourism promoters to bring visitors into the state and offers the “Avenue of Invasion” driving tour route in the District.

4.3 INTERPRETIVE THEMES

Themes are the essence of a story, often forming the core of visitor memory. The Civil War events that occurred in the District are central to the story of the Shenandoah Valley, but the District is not the entire Valley. Interpretation should address the Shenandoah Valley and focus on sites and stories in the District. This principle also applies to the development of tourism marketing messages.

The Management Plan identifies three primary themes for interpreting the Civil War in the Shenandoah Valley:

- **The Valley:** The Valley’s blend of geography, history, economy, and culture made it a focus of attention for both the North and South during the War.
- **The Campaigns:** Each of the campaigns fought up and down the Valley varied in ingredients—different objectives, different leaders, different results—yet each played an important role in determining the outcome of the War.
- **The Battles:** Each of the ten battles included in the District can be studied to discover different aspects of Civil War combat, and their effects on civilian life.

4.4 INTERPRETIVE SITES AND FACILITIES

The system of interpretive sites and facilities, as described in the Management Plan, includes

- **Civil War Orientation Centers:** one in each of the five clusters, to be developed independently of one another and of the Foundation;
- **Battlefields:** the ten identified in the legislation, plus others as appropriate;
- **Tour routes:** historic routes within the District that were used by troops in the Civil War; and
- **Civil War-related resources:** found throughout the District, interpreted by museums, historical societies, markers and monuments, etc., these resources also include towns and cities.

The District-wide interpretive plan should be a means to knit these sites together into a system that appeals to both tourist and resident. The role each of the sites is expected to play in the overall interpretive system is discussed below.

Civil War Orientation Centers

A Civil War orientation center is to be created in each cluster. Existing interpretive facilities may be improved and developed as orientation centers or new ones may be developed. This section describes these centers generally, as they fit into the overall interpretive system. Section 4.5 discusses issues related to the centers that should be addressed in preparing the District-wide interpretive plan. In section 5.4 of Chapter 5, the relationship of the orientation centers to tourism in the District is described.

Each Civil War orientation center should place the Shenandoah Valley into the larger context of the Civil War and encourage visitors to consider the legacy of the Civil War and, more specifically, the War in the Valley. All centers should introduce the three major themes, but each could have a different perspective on the War.

The orientation centers are a critical part of the interpretive system; they should be planned from a District-wide, not a purely local point of view. They must be complementary. They are pieces of the big picture and that big picture will be incomplete if all the pieces are not in place. There should be a consistently high standard of quality at all of the centers.

The orientation centers are different from visitor centers that exist in the District. Generally maintained by tourism agencies, visitor centers primarily offer visitors information useful to their visit to the Valley and all of its resources—beyond Civil War heritage. Some may have a modest interpretive

function linked to local history. The Civil War orientation centers, on the other hand, are intended to play a distinctly different role from the general visitor or information center. The orientation centers are to be quasi-attractions where the traveler encounters the first level of Civil War interpretation of the District.

Battlefields

Many of the ten battlefields are already interpreted but to widely varying degrees. These include an array of commemorative markers, interpretive signs, battlefield roads, preserved historic structures, local museums, tours, brochures, and reenactments. Some are interpreted better than others, but all need improvement. A coordinated and comprehensive approach to interpreting the War in the District is needed, covering the multiple facets of the struggle and linking one battle with others. Additional facilities for visitors on or near the battlefields—interpretive centers, trails, wayside exhibits, and the like—are proposed in the Management Plan. Detailed follow up studies will be required to determine exactly what types of facilities will be appropriate at each battlefield.

Historic Routes

Interpreted routes following historic paths of travel (from walking trails to railroads to multi-lane highways) are tangible links between sites and offer a means for visitors to experience the District's history and landscape. They should help visitors to see the "landscape features that affected military tactics and contributed to pre- and post-war wealth and prosperity," and visitors should gain "firsthand experience with the distances traveled by armies."¹³ The Virginia Civil War Trails program's route, "Avenue of Invasion," presently the only Civil War driving tour in the Valley, is expected to form the basis from which a broader system of historic routes is developed.

Civil War-related Resources

There are more than 30 Civil War-related interpreted sites and resources in the District. These sites complement interpretation at the battlefields and are essential to realizing the full interpretive and educational potential of the District. Figure 4.2 (page 65) lists these sites.

¹³ As quoted from the Shenandoah Valley Battlefields National Historic District Commission Act, P.L. 104-333

4.5 THE DISTRICT-WIDE INTERPRETIVE PLAN

The Management Plan calls for the creation of a District-wide interpretive plan as one of the first implementation steps. The primary goal of this plan will be to outline a regional, comprehensive, integrated approach to interpreting the battlefields, historic and natural sites, towns and cities, and roads that comprise the District. It should outline tasks needed to accomplish the educational purposes of the legislation and plan, and to coordinate and improve storytelling among the District's interpretive partners. It should promote cooperative efforts among the various sites and jurisdictions. It should also minimize interpretive fragmentation that can confuse visitors. Lastly, it should recommend programs, materials, and media that are engaging, effective, and financially sustainable.

Developed through a collaborative process, the plan should explain how the identified interpretive themes, stories, and experiences could be presented—which media would best present the themes and offer visitors the experiences envisioned in the Management Plan. It should also identify which partners should assume responsibility for media development. All communications media are tools for contacting and informing the public (including potential visitors) about the District. Television and the Internet, in particular, have demonstrated their potential to reach huge audiences and promise to revolutionize education with emerging techniques for distance learning. Well-considered use of these media could substantially increase public knowledge of District sites.

Although the District-wide interpretive plan is the logical next step in implementation, it cannot answer all site-specific interpretive questions. Within a framework established in the interpretive plan, each interpretive site—battlefield, town, museum, or other site—should continue to refine and focus on its own interpretive program.

Key Issues for the District-wide Interpretive Plan

There are a number of key issues that should be addressed in the plan:

- **Develop management and interpretive goals that provide guidance for managers of District resources.** These goals should describe outcomes that interpretation can help to achieve—increase the number of tourist dollars spent in the District, expand the number of District residents who participate in preservation efforts, encourage teachers to use District resources as educational tools, etc. They should offer a means of judging the value of

interpretive ideas and should, along with themes and statements describing desired visitor experiences, be used to set priorities.

- **Wayfinding should either be addressed in this plan or coordinated with a separate planning effort undertaken simultaneously, as discussed in the next section.**
- **Define standards and roles for the Civil War orientation centers beyond that contained in the Management Plan.** Specifically, the interpretive plan should identify the roles, facilities, and other characteristics that each of the orientation centers would need to meet and set minimum standards for accomplishing them. All, for example, might have a staffed desk, visitor amenities (rest rooms, phones, seating, water), a District-wide "map," an interpretive exhibit area, a sales area, and a tour staging area (inside and outside). The plan should also describe the type and level of interpretive information that would be found at the centers. For example, each center should place the War in the Valley into the larger context of the Civil War, explore the wartime implications of the Valley campaigns, and suggest long-term impacts of the War itself. The plan should recommend interpretive media that would accomplish that critical interpretive mission.

As described in the Management Plan, all of these orientation centers should provide general context and introduce all themes. An important task for the District plan, however, is to choose a focus for each of the five orientation centers. Each could advance the Civil War story line using different perspectives. One center might focus on the military, another on the civilian experience. This approach could make each center distinctive, encourage travelers and residents to visit more than one center, and help to achieve identified visitor experiences.

The interpretive plan should state how each center will provide the visitor experiences described in the Management Plan, and identify the specific audiences each is to accommodate.

- **District-wide interpretive themes should be applied to individual sites throughout the District and determine which themes already are represented and where.** An expanded and updated inventory based on work begun during the management planning phase should identify under-represented themes and "untold" stories and suggest appropriate interpretive programs and facilities to fill those gaps and achieve greater balance in thematic interpretation.
- **The interpretive plan also should help each cluster, battlefield, site, or town to identify and develop its own interpretive "personality."** The plan should identify the interpretive strengths of individual resources, link them to the District themes and events, and recommend programs and activities that would strengthen the collaborative/collegial

relationships of the sites. The interpretive plan should be a guide for individual battlefields and Civil War-related resources to direct their own interpretive activities. Once the plan puts the “big picture” in place, local stories and lore can be added to the interpretive structure at individual locations. The plan should explain what types of programming the Foundation and others should support throughout the District. It should also outline multiple ways for sites to become part of the District-wide interpretive program.

- **Provide guidance for interpreting each battlefield.** The battlefields should be considered the focal points of District interpretation. The plan should describe a variety of possibilities for interpreting the battlefields to a variety of interest groups and how to coordinate the story telling between the battlefields. It should also illustrate how all of the pieces of the interpretive story could be organized and suggest which interpretive media might make the best use of local resources. It must, however, leave the details of implementation (e.g., endorsement of media ideas, funding, staffing, and timing) in the hands of local site administrators.
- **Guidelines or standards should be developed for sites to obtain the Foundation’s endorsement of interpretive programs and facilities.** Minimum standards or thresholds developed through the plan should be designed to help every site improve its interpretation and operation, but the plan cannot and should not assume responsibility for all interpretive decision-making. The plan might also suggest programs the Foundation could sponsor to assist partnering organizations with improving content, format, and operation of sites and interpretation.
- **Establish criteria that define standards of professional operation and management for partner sites.** For example, the interpretive plan might include criteria that can be used to assess the adequacy or professional quality of signs, landscapes, trails, exhibits, publications, collections care, special events, memorials, etc. The plan could offer step-by-step advice on program or media development—a series of how-to checklists, for example.
- **Outline a program of technical assistance the Foundation, National Park Service (NPS), and others could provide to sites in the District to help them provide higher quality interpretation and visitor experience.** The specific nature of the technical assistance should be defined and available on a sustainable basis—staff training, assistance with development of specific interpretive media, site promotion, leadership development, fundraising, etc. The plan should propose strategies to encourage regular communication and exchange of ideas among interpretive partners.

- **Explore the potential for shared staffing between interpretive sites and partners.** Because the capabilities of sites and battlefield administrators vary, many would benefit from technical assistance for interpretive planning and access to a shared interpretive specialist to help explain appropriate uses (and misuses) of interpretive techniques. Other examples include an education specialist, a Website coordinator, a public affairs specialist, a historian, a landscape architect, etc.
- **Explore the possibility of establishing a licensing program for trained professional guides.** The District-wide interpretive plan should build upon existing tour events by exploring the feasibility of ongoing guide service, perhaps via a licensing program for battlefield guides. It should consider ways to sustain high quality and historical accuracy in living history and reenactment events and ensure both the safety of participants and visitors and the protection of resources.
- **Explore the feasibility of an interpretive transportation system around a cluster or clusters as well as from cluster to cluster.**
- **Develop a program of organized instruction for appropriate grades and types of learners, including college students and other adults.** The interpretive plan should consider expanded workshops and conferences that focus on District-wide themes.
- **Identify interpretive materials that would be prepared and distributed District-wide by the Foundation or other partners.** Possibilities include wayfinding, brochures, maps, thematic publications, curricular materials for educational programs, exhibits, audiovisual materials, Internet programs, and sales items including reproductions.
- **Recommend ways for bringing existing interpretive sites into compliance with the Americans with Disabilities Act.**
- **Recommend where further research is needed to fully address certain themes or stories, (particularly "untold" stories, e.g., women, African Americans, children, etc.).**
- **Identify partners who would be responsible for leading implementation of each item, and the timing for each action.**
- **Develop estimated costs for each action item.** When staffing is involved, the plan also should estimate the time necessary to fulfill a role or complete a task and project the number of full-time positions or their equivalent. Realistic and sustainable staffing is an important consideration for any proposal and should help to define the extent of and costs of technical assistance.

Request for Proposals for the District-wide Interpretive Plan

Requests for proposals (RFP) should target consultants with experience and professional expertise in regional interpretation. A letter accompanying the RFP should provide background on the project, expected start and finish dates, a contact for further information, the deadline for the receipt of proposals, and the interview date. The Foundation's Interpretation and Education Committee should interview prospective candidates.

The RFP should ask candidates to submit the following:

- Statement of qualifications and experience;
- Philosophy and approach to interpretive planning;
- Proposed methodology for this particular project;
- Description of and samples of specific interpretive plans;
- Relevant experience working with heritage areas, projects with multiple sites and partners, and projects that involved community meetings;
- Proposed timeline for completion of the plan;
- Proposed budget, including hourly rates for services and an indication of which individuals, if part of a team, will be working on specific aspects of the project; and
- References.

4.6 WAYFINDING

The design and implementation of a District-wide wayfinding system is a critically important responsibility of the Foundation. This system should include entry, directional, and interpretive signs plus a Website, brochures, driving tour guides, and other publications. As the Management Plan states in describing visitor experiences, "Visitors would be able easily to figure out what there is to see and do, and move from one to the other without confusion." All significant historic and natural sites should be consistently and distinctively designated by signs designed to be visible yet non-intrusive, and which reflect the stories and visitor experiences identified in the Management Plan. The signs should provide some degree of information and interpretation about each site and be keyed to a comprehensive set of guides and Websites.

Through a wayfinding program, the Foundation and its partners can help establish a set of design principles to help District communities make signage decisions. Signs need not be identical, but should

be linked via a common palette of materials, colors, shapes, etc. For example, this system might recommend the use of specially designed signs to mark the District” towns, and to use locally distinctive street signs, rather than relying on the standardized green templates, to create a distinctive image for the region.

The design of the wayfinding system can be done independently or developed as part of the District-wide interpretive plan. In either case, a consultant should be sought via a RFP. The RFP should ask candidates to submit the following:

- Statement of qualifications and experience;
- Philosophy and approach;
- Proposed methodology for this particular project;
- Description of and samples of specific wayfinding programs;
- Relevant experience working with similar areas;
- Proposed timeline for completion of the project;
- Proposed budget, including hourly rates for services and an indication of which individuals, if part of a team, will be working on specific aspects of the project; and
- References.

The wayfinding program should:

- Develop options for a District logo;
- Identify map styles and provide map prototypes, including simple and graphically pleasing maps to be made available as interpretive signs throughout the Valley, including at Interstate exits and entrances to Valley towns. These maps should rely on pictorial images rather than extensive text and be linked to the signage systems and the information presentations implemented at the orientation centers.
- Select a color palette;
- Design a system of directional and interpretive signs (different sizes, uses, shapes, etc.);
- Design a family of informational and interpretive brochures;
- Define vocabulary that should be used in all District-prepared materials (standard names for historic routes, clear definitions for facility types—orientation centers vs. visitor centers vs. museums, for example);
- Provide criteria for locating District-wide signs;

- Reach out to partners, especially government officials (towns, counties, state, and federal)—particularly those responsible for highway safety, signage, and maintenance—and tourism agencies and businesses; and
- Establish procedures for sustaining the system (who should install, maintain, and replace signs/maps, revise and reprint brochures, etc.).

This RFP may be combined with the RFP for the District-wide interpretive plan, since planning for wayfinding will involve many of the same partners. Much of the implementation, however, should be assigned to the Foundation’s Tourism Committee, because of its implications for tourism. A large number of partners in that arena must also be consulted and relied upon to implement the wayfinding program. (In addition, the number of actions required of the Interpretation and Education Committee suggests that it would be well for another committee to take on some of the responsibility.) Whether the wayfinding is undertaken within the same RFP or not, the two activities should be undertaken simultaneously and coordinated because wayfinding is so significant a part of interpretation as well as tourism.

The Management Plan calls for a wayfinding system that builds upon the Virginia Civil War Trails program’s “Avenue of Invasion” tour route, but which will ultimately achieve a broader, more complex scope. The system should include at least two types of designated routes—direct and scenic. Direct routes would allow visitors to move throughout the District quickly and efficiently. Scenic routes, however, would enrich the visitor experience by encouraging travel along historic roads and through agricultural landscapes and historic towns and cities.

In addition, this wayfinding system must complement signs and interpretive materials developed by others and already in place. In fact, the new wayfinding system is expected to be a hybrid program using the recognizable Virginia Civil War Trails “trailblazer” directional signs with a District logo denoting battlefields and other sites supported by the Foundation. It should accommodate the wide variety of sign functions that might be recommended by the interpretive plan (hiking trails, interpretive trails, walking tours of towns, bike trails, rail-trails, and tour bus routes, for example). Wayfinding along both scenic and direct routes would help visitors access the variety of experiences, recreational and historical, that exist in the District.

Development of the wayfinding system should focus on selecting sites for sign installation (using criteria written into the wayfinding system) and on identifying actual routes of travel (both direct and scenic routes between clusters as well as within each cluster). While some of this on-the-ground development can be pinpointed in the wayfinding plan as actual examples, it would be costly to do all such construction planning in the plan. It is better to provide criteria and examples and allow the rest of

the system to evolve under the leadership of the Foundation and partners, focusing on various areas or routes one at a time, perhaps in order of priority established in the plan.

Implementation also requires planning, design, production, and distribution of printed materials and one or more Websites to direct visitors from site to site and cluster to cluster.

4.7 INITIAL ACTIONS FOR INTERPRETATION

The following actions should be undertaken over the first one to three years of implementing the Management Plan. The Foundation's Interpretive and Education Committee would be largely responsible for these actions, working with the Tourism Committee on wayfinding.

- **Prepare the District-wide interpretive plan and wayfinding system as described in sections 4.5 and 4.6 — *Foundation*.**
- **Erect District entry signs on major transportation routes**, working with the Virginia Department of Transportation. Leave room for the logo so it can be added when designed. As a result, millions of travelers on Interstate 81 should be introduced to the District — ***Foundation***.
- **Create a “historic routes and towns” driving tour**. The resulting brochure, audiocassette, or compact disk could be accompanied by brief text on the impact of the War and an invitation to drive the District's historic routes — ***Foundation/Partners***.
- **Install signs in areas frequented by visitors to entice people to visit interpretive sites**. For example, place a sign in a hotel parking lot when an interpretive site is nearby. The sign should catch hotel visitors' attention and potentially pull them out of their way to a town or battlefield they had not previously considered visiting. These signs could be of two types: they might address the impact of the War on a particular town, or they might be one of a series of generic signs that introduce the District's themes—transportation corridor, campaigns, impact of the War, etc — ***Partners***.
- **Extend or enhance the Virginia Civil War Trails “Avenue of Invasion” tour route by adding waysides** that flesh out untold stories. Although much of the planning for full-scale enhancement should be undertaken in the context of the District-wide interpretive plan, the Foundation could work with the Virginia Civil War Trails program to add new sites immediately. Longer term, each town should have at least one wayside that describes its Civil War experience — ***Partners***.

Interpretive sites should be located to:

- explain the impact of "The Burning";
 - mark stories related to civilians, women, African Americans, children, etc.;
 - interpret the role played by raiders and partisans;
 - interpret the District's agricultural history (find overlooks where visitors can still see grain fields, livestock, etc.); and
 - interpret the role of religion in the War.
- **Organize a conference, the first of a series, that addresses less-interpreted aspects of the District's stories**—the campaigns of 1864, "The Burning," or spies in the Valley, etc. Each cluster could organize a tour that links their sites to the theme — ***Foundation/Partners***.

4.8 EDUCATIONAL PROGRAMS

The Management Plan directs the Foundation to place a high priority on education and research by developing a curriculum focused on the Civil War history of the Valley and specifically of the battles. This may be accomplished by supporting educational and research institutions and programs that will further the interpretive mission of the Foundation and its partners. The Management Plan addresses the significant unrealized opportunities for furthering education and understanding about the Civil War and its impact on our nation. In particular, the plan calls for developing an educational curriculum for students in Virginia's primary and secondary schools. The Management Plan envisions the District as a classroom and laboratory for discovery, study, and a physical connection with Virginia's heritage.

Partners in Education

Of the battlefields, presently only the New Market State Historical Park and the Hall of Valor Museum has a curriculum for primary and secondary students. Belle Grove Plantation also receives a number of student visitors and includes the Civil War as an aspect of its story. Likewise, there are a number of non-battlefield sites that include the Civil War in their interpretation. However, there is little coordination between sites and no comprehensive approach to using Civil War sites in the Valley as classroom extensions.

A number of higher-education institutions do sponsor programs and research focused on the Civil War. These include the McCormick Civil War Institute at Shenandoah University, the Virginia Military Institute, and James Madison University in the District. Other nearby institutions are Shepherd College in West Virginia, the University of Virginia, and Virginia Polytechnic Institute and State University.

The Foundation, along with those of its partners involved in education in the District, should explore new alliances and opportunities for funding and other assistance. The Foundation itself is expected to have some financial resources to devote to achieving the Management Plan's goals for education and research. This will initially be directed toward creating the interpretive plan.

Additional partners and sources of technical assistance and funding include:

- Foundations and corporations (local, state, and national)
- Institute of Library and Museum Services - www.ims.gov
- National Endowment for the Humanities - www.neh.fed.us
- National Endowment for the Arts - www.arts.endow.gov
- U. S. Department of Education - www.ed.gov
- National Park Service - grant funding and technical assistance – www.nps.gov/technical.htm;
- National Park Service – Civil War Soldiers and Sailors System - www.itd.nps.gov/cwss
- Civil War Preservation Trust (its Civil War Explorer program) - www.civilwar.org
- Parallel agencies in the Commonwealth of Virginia
- Local school systems and institutions of higher learning
- James Madison University - www.jmu.edu
- Mary Baldwin College - www.mbc.edu
- Shenandoah University - www.su.edu

The District as a Classroom

The Foundation should look for ways to begin fulfilling its educational mandate that will put programs in the schools, information in front of the students, and children at the sites as quickly as possible. This should largely be done by partnering with existing educational programs and providing modest seed grants to get institutions interested and active in the possibilities of using the District as a teaching tool. Early on work might be cosponsored with one or more of the educational institutions listed above as well as the Virginia Civil War Trails Program, the Civil War Preservation Trust, or local school districts.

Ultimately, lesson plans and educational activities should communicate the District's interpretive themes, instill an understanding of the impact of the Civil War and related events, enable a "virtual" visit to key sites via the Internet, and invite a future site visit or field trip. Since many school systems have curtailed or severely cut back opportunities for school-sponsored field trips, use of the Internet to allow students and teachers to connect with the District and its individual sites takes on elevated importance.

There are a number of excellent programs and Websites for K-12 classroom teachers and educators at historic sites that offer suggestions for integrating exploration of real places into the curriculum. Teachers should be encouraged to teach not only history, but also incorporate science, math, sociology, and other subjects while on site. The following resources are a good start for research on Civil War educational programs and links to other sites:

- Heritage Education Network - www.mtsu.edu/~then
- Teaching With Historic Places (NPS, National Trust for Historic Preservation) - www.cr.nps.gov/nr/twhp
- Parks as Classrooms (NPS) - www.nationalparks.org/npf/programs/education/PAC.htm and www.nps.gov/blri/vapac.htm
- Civil War Preservation Trust (www.civilwar.org offers resources and links for teachers)
- United States Civil War Center at Louisiana State University - www.cwc.lsu.edu

Initial Actions for Education

The Foundation should consider establishing an Education Advisory Subcommittee to serve as a resource to the Interpretation and Education Committee. Members of this working group might include representatives from primary and secondary schools and institutions of higher learning in the District; noted scholars in the area of Civil War history and related topics; representatives of state or national partners; and others with special expertise in education. Immediate tasks of this advisory committee include:

- **Identify areas where further research is needed for Civil War interpretation and curriculum development — *Foundation*.**
- **Support educational and interpretive programming and initiatives for schools (K-12), educational institutions, and continuing education programs, through the Internet, tours, academic courses/internships, seminars, conferences, etc. — *Foundation*.**

- **Provide matching grants to support education and interpretation.** While initially the Foundation will focus on the development of the District-wide interpretive plan, over time, it should support Civil War educational programs and fund research. — *Foundation.*
- **Develop a Civil War unit of the statewide history curriculum for primary and secondary grades, using the District as a classroom — Partners.**
- **Offer interpretive materials and programming developed especially for children and students at the Civil War orientation centers and battlefields.** These facilities should make use of material developed for the school curriculum and vice versa. For example, interactive battlefield tours developed for student field trips could be offered on a periodic basis to visitors of all ages — *Foundation/Partners.*

CHAPTER 5

VISITOR SERVICES

5.1 INTRODUCTION

5.2 ROLE OF THE FOUNDATION AND PARTNERS IN SHAPING THE VISITOR EXPERIENCE

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CHAPTER 5

VISITOR SERVICES

5.1 INTRODUCTION

One of the Shenandoah Valley Battlefield National Historic District Commission's (Commission) goals for the Shenandoah Valley Battlefields National Historic District (District) states:

The District will stimulate the Valley's economy by expanding heritage tourism, protecting productive farmland, and enhancing the quality of life in the Valley. The District will strive to balance preservation and economic development in the Valley.

Moreover, the Management Plan envisions that "visitors would expect to experience a high degree of Valley hospitality in each town" because of efforts by the Foundation and its partners. In large measure, the Commission's rationale behind the "clusters" was to create an enjoyable visitor experience and help communities work together to take advantage of potential economic benefits.

This chapter describes steps needed to attract and host visitors in a way that benefits communities. These steps include:

- Developing products and services desired by visitors;
- Assuring high-quality hospitality;
- "Placemaking" (assuring that the charm and quality of communities and landscapes are retained);
- "Branding" (developing an image); and
- Undertaking a marketing and promotion program for the District.

Other ingredients of a successful tourism development and management program—especially wayfinding, creation of orientation centers, and battlefield interpretation—are described in Chapter 4.

These steps would help assure that the economic benefits flowing from the District's growing interpretive and resource protection programs would be apparent and sustained, so that the Valley enjoys a significant return on public investment in the form of jobs, business and tax revenues, and enhanced property values. With such economic benefits in hand, governments, businesses, and others

will hopefully continue to support the Shenandoah Valley Battlefields Foundation (Foundation) and its partners' efforts to maintain and improve their programs.

5.2 ROLE OF THE FOUNDATION AND PARTNERS IN SHAPING THE VISITOR EXPERIENCE

The visitor experience in the District will reflect the character and quality of four types of facilities:

- Attractions (commercial as well as interpretive facilities);
- Recreational opportunities;
- Services (places to eat, sleep, and shop); and
- Infrastructure (access, signage, parking, rest stops, etc.).

In addition, the visitor's perception of the District before, during, and even after a visit will contribute to the visitor experience. Scenic enjoyment may require special attention because the Valley's landscape is so compelling.

Enhancing the visitor experience is a partnership among a wide array of entities, including the public sector—especially agencies engaged in historic preservation and environmental stewardship—along with nonprofit organizations and private enterprise.

The Foundation's role will be to identify and seek out partners among this wide array of entities, design appropriate cooperative programs, and oversee implementation of these programs. The Foundation should take a strong role in assuring high-quality, sustained implementation.

Independent action by the Foundation may be required in some cases, such as:

- Developing a graphic identity;
- Undertaking promotional activities identified in the marketing plan as the direct responsibility of the Foundation—at a minimum, developing and maintaining printed materials and a Website; and
- Undertaking or overseeing the cooperative marketing and promotion of the District, the goal for both Foundation and partners working together to create a coherent vacation destination, rather than an assemblage of things to see and do linked only by geographic proximity or thematic relationship.

Over time, the Foundation may also develop the capability to provide technical assistance and grants for interpreting institutions requiring assistance in marketing and promotion. Through its "clusters"

approach, it will also work with tourism specialists, towns, and others to enhance the current visitor reception system, assure interpretation and hospitality unique to each cluster, and encourage appropriate economic development that enhances the visitor experience.

5.3 PRODUCT DEVELOPMENT

From a tourism industry perspective, “product development” simply means expanding the menu of things to see and do that appeal to desired visitor market segments. The visitors purchase these experiences, often sight unseen, using both real dollars—paying admission fees, or spending money on transportation, lodging, or dining, for example—and the currency of time throughout their trip. Product development may mean packaging experiences and services together to provide a convenient means of seeing sites and purchasing hospitality services or it may mean developing or enhancing a specific attraction. It may also mean improving a place, such as a historic downtown, to make the destination more appealing.

Tourism product development generally focuses on (1) ways to enhance existing attractions and draw more of their existing audiences, and (2) ideas for new attractions that can draw additional visitors and new audiences. In both cases, a primary goal is to extend the length of time that visitors spend in an area, preferably increasing the number of overnight stays, which has the greatest economic impact. Both approaches need to be supported with appropriate infrastructure, signage, and marketing activities.

The Civil War orientation centers described in Chapter 4 represent the most visible aspect of product development included in the Management Plan, but developing additional visitor facilities at battlefields, enhancing other interpretive sites, or making interpretation available in towns are all examples of product development.

Actions to Develop Additional Tourism Products

Tourists choose destinations based on a variety of factors that boil down to whether they believe that the mix of things to see and do comports with their interests and vacation motivations. While the Shenandoah Valley offers an array of tourism products ranging from the battlefields and interpretive centers to Luray Caverns to scenic towns and drives, adding to the mix accomplishes several key objectives. The more a region offers, the more tourists perceive a critical mass of activities that meet

the needs of all members of their traveling party. Moreover, new tourism products provide a reason to return for another visit and create opportunities to publicize the complete Valley experience.

The Foundation, acting through its Tourism Committee and in cooperation with partners, should consider encouraging the development of additional tourism products by offering or arranging to have partners offer:

Technical Assistance — Help existing commercial and not-for-profit attractions expand their offerings by providing technical assistance to ensure that they have access to the information and talent required to make strategic product development decisions. This technical assistance may take many forms, including:

- Providing or identifying sources of tourism data on visitor characteristics, volume, markets, and behavior — **Foundation**.
- Providing grantsmanship assistance, for example, by identifying foundations with pertinent interests and helping institutions approach corporate sponsors and private donors — **Foundation**.
- Identifying sources of interpretive/design expertise, particularly through area colleges and universities that may offer low-cost assistance — **Foundation**.
- Fostering appropriate regional partnerships—connecting District groups with, for example, tourism promotion organizations, the Virginia Department of Transportation and other state agencies, and Virginia Civil War Trails—by facilitating introductions and nurturing relationships — **Foundation**.
- Identifying sources of marketing/feasibility expertise from within the community as well as via professional associations — **Partners**.
- Determining eligibility for state and other public funding, including infrastructure improvements and joint marketing efforts — **Partners**.
- Advising on contract terms and other business matters for example, when an organization whose primary expertise may be in interpretation requires advice on visitor services or marketing — **Partners**.

Assistance for Special Events — Encourage partners to help communities organize special events that showcase aspects of the Shenandoah Valley and introduce visitors to its unique charms and attributes, especially people who would not otherwise visit Civil War sites. Such assistance might include:

- Identifying potential themes for events and planning for the resources to be devoted to their development — **Foundation**.
- Maintaining a calendar for intra-regional coordination and to facilitate joint promotional efforts — **Foundation**.
- Creating a logistics manual to be used as a reference by event sponsors — **Partners**.
- Identifying and maintaining shared resources, e.g., tents, portable refreshment stands, traffic control equipment, audio equipment, etc. — **Partners**.
- Negotiating joint service provision, e.g., insurance, security, portable toilets, equipment rental, advertising/publicity, etc. — **Partners**.
- Advising on contracting and procurement issues for resources and services — **Partners**.

Encouraging Placemaking Activities — Undertake historic preservation, downtown revitalization, public art installations, sensitive and economically viable adaptive re-use of buildings, streetscape improvements, and other efforts that can potentially offer unique experiences to visitors. Efforts to charm visitors with historic character and beauty will reinforce the distinct identity of each town, and generate opportunities for economic development through increased visitor volume. These activities are discussed in detail in Chapter 3 — **Partners**.

Actions to Improve Provision of Visitor Services

While the attractions motivate visitors' decisions to visit the Shenandoah Valley, even the most dedicated Civil War enthusiasts are affected by the caliber of the visitor services encountered during the trip. Surly clerks, sloppy housekeeping, grungy restrooms, and other indignities suffered by travelers detract from the visitor experience and sabotage word-of-mouth recommendations about the attractions themselves.

Some of the same activities described above concerning the development of new products also apply to existing businesses, attractions, and communities as they seek to improve visitor services.

In addition, the Foundation, acting through its Tourism Committee, should foster the development of extraordinary hospitality and services by encouraging partners to offer:

Training

- Develop an on-going program to provide hospitality and merchandising training to employees of hotels/motels, restaurants, gas stations, convenience stores, and other businesses typically

frequented by tourists. As a basic goal, clerks should be able to provide directions to major attractions and other visitor services; ideally they should be able to engage visitors in conversation about the other offerings in the District based on a visitor's expression of interest, and comment on their own experiences in enjoying District attractions — **Partners**.

- Coordinate entrepreneur/small business training geared towards individuals who want to launch businesses catering to tourists — **Partners**.
- Provide training in marketing and promotions to help local businesses use their advertising budgets effectively — **Partners**.
- Help launch groups that agree to share tips, techniques and war stories—learning from each other—as well as enable employees to spend time at attractions and hospitality providers as guests to increase their knowledge about the District's offerings — **Partners**.

Evaluations

- Establish regional service/operations goals and minimum standards — **Foundation**.
- Create a “secret shopper” program—where “professional visitors” conduct transactions and report on their experiences—to keep owners and managers apprised of their ability to cater to tourists' needs — **Partners**.

Awards and Contests

- Implement regional trivia contests to reward employees who master information needed by tourists — **Foundation**.
- Institute an annual awards program that celebrates businesses in the region that provide exemplary service — **Partners**.

Recruitment

- Identify services missing from the region's hospitality sector and recruit potential providers — **Foundation/Partners**.

Best Practices

- Provide best practices case studies and other helpful information to — **Partners**.

Coordinated Regional Marketing and Promotional Efforts

- Establish and maintain one or more Websites that include links not only to visitor attractions and services, but also to state and regional tourism sites — **Foundation/ Partners.**
- Coordinate familiarization (“fam”) tours and individual visits for travel writers and other tourism promoters/packagegers as a way to spread the word about District destinations — **Foundation/Partners.**
- Manage public relations activities — **Foundation/Partners.**
- Support cooperative and other regional marketing activities such as those sponsored by the Virginia Tourism Corporation, the Shenandoah Valley Travel Association, and the Virginia Bed & Breakfast Association — **Foundation/Partners.**
- Coordinate seasonal promotions activities such as sidewalk sales and holiday decorations — **Partners.**
- Create a local currency program, where visitors spend “Shenandoah Scrip” or “Battlefield Bucks” to buy services or products at a discount from participating merchants — **Partners.**

5.4 Civil War Orientation Centers

The Management Plan for the District calls for organizing the Valley’s Civil War resources into five “clusters” centered on concentrations of battlefields. Each cluster features a Civil War orientation center anchoring the visitor experience and accomplishing several objectives:

- Providing visitor information;
- Providing interpretive exhibits;
- Providing comfort facilities (i.e., restrooms, vending machines); and
- Stimulating private investment.

For each of these objectives, each orientation center must address a number of concerns, as described below. This section describes the orientation centers from the perspective of tourism development; Chapter 4 also describes them as they fit into the interpretive system and the District-wide interpretive plan.

Visitor Information

For many visitors, the first contact with a person in the District will occur at an orientation center. Orientation center staff must be knowledgeable enough about hospitality, local destinations, and regional history to meet visitors' needs effectively. The respective roles and functions of the Civil War orientation centers need to be coordinated with the visitor and welcome centers in the District. It has been the Commission's intention that the orientation centers have Civil War sites and interpretation as their primary focus while also providing some basic visitor information. The task of providing "first contact" traveler information and services, such as restrooms or putting together travel packets, is left to the traditional visitor centers. The orientation centers should be sufficiently staffed at times when visitor volume is heaviest, most likely on weekends. It may be possible to rely on volunteer staff during lighter periods, but relying exclusively on volunteer staff during peak hours is not recommended.

Interpretation

To distinguish themselves from the VDOT welcome centers and other visitor centers in the District and to ensure that visitors enjoy their experience and appreciate the region's Civil War history, the orientation centers must do much more than provide maps and brochures. They must help travelers to understand how events at nearby battlefields fit into the various campaigns and other Civil War stories found in the clusters and throughout the District. Staff can also help visitors choose how to spend their time in the District and navigate their way to Civil War sites. If a center provides this information in a compelling format, perhaps using models, interactive exhibits, or a short video presentation, visitors will get the message that there is plenty to see and do, and that the District represents an interesting aspect of Civil War history. Centers could also stock books and audiocassettes about Civil War history in the Shenandoah Valley.

Comfort Facilities

Visitors traveling to orientation centers, particularly in more remote locations, such as McDowell or Cross Keys/Port Republic, will likely have come a great distance. Upon arriving, the first thing many visitors seek is a restroom or refreshments. Even more so than in commercial establishments, comfort facilities in orientation centers must be pleasant and well maintained. Vending machines and other

refreshment sales can become a source of revenue for each center. Alternatively, each center, perhaps working with the Foundation, could contract with a concessionaire to sell food and beverages to travelers. (Depending on the extent of the services provided at each site, the provision of refreshments might be perceived as unfairly competing with businesses in nearby communities.)

Private Investment

Orientation centers will attract new visitors to the center of each battlefield cluster, often to areas with little commercial development. Especially in these areas, opportunities will arise to promote private investment and entrepreneurship. For example, a private vendor could operate a sandwich cart in an orientation center, or could even open a restaurant on a nearby site. Additionally, orientation centers could capitalize on local talent by selling the works of local artisans and artists. Groups in each cluster may find it useful to scope out needed services and products and work with local economic development supporters to provide help in stimulating appropriate private investment.

5.5 SIGNAGE AND WAYFINDING

The quality of the District's signage and wayfinding system contributes to its image and the extent to which visitors enjoy the experience. Lost visitors with only confusing maps to guide them become unhappy visitors who miss out on enjoyable experiences and tell others of their bad experience. A distinctively designed, comprehensive signage program would help enhance the District's sense of place, setting the tone for the interpretive experience, and giving visitors and residents a sense of how the region is organized and accessed.

The Foundation could help establish a set of design principles to help communities make signage decisions; signs need not be identical, but should be linked via a common palette of materials, colors, shapes, etc. A wayfinding system, while reliant on signage, extends beyond directional signs to include printed and digital media available before and during a tourist's visit. The primary discussion of wayfinding is found in Chapter 4, section 4.6.

5.6 UNDERSTANDING IMAGE DEVELOPMENT

In the past decade, it has become clear that the same principles that apply to establishing a presence, an image, and a market identity for consumer products apply to tourism destinations. Tourism destinations that create identities for themselves, evoking positive emotional responses in consumers, nurture ongoing relationships with the traveling public, even before trips are actually organized and completed. The Foundation can benefit from the icon status of the Shenandoah Valley and nurture a brand identity as has been achieved by such diverse destinations as Cape Cod, Yellowstone, the Napa Valley, and Vermont. “Shenandoah” already enjoys positive associations thanks to the river, Skyline Drive and the National Park, and, of course, the song.

“Heritage Area,” “National Historic District,” and “Scenic Byway” are also brands; they connote quality to people who tour as well as people who do not. These convey the idea that an exceptional visitor experience is available in association with places that enjoy these designations, even if people cannot articulate how that is accomplished (e.g., no billboards). A brand is a tangible business asset that motivates visitation and thus has value. The Foundation will need to build up the brand of the “Shenandoah Valley Battlefields National Historic District” in a strategic and logical fashion.

While commercial attractions, interpretive facilities, recreation opportunities, scenic enjoyment, places to eat, sleep, and shop, and other aspects of visitor services (availability of ATM machines, or clean restrooms, for example) shape the actual visitor experience, other factors influence people’s expectations about the benefits of visiting the District. Some of these expectations are stimulated by many factors beyond local control, but strategic image development and subsequent communications programs contribute to both positive visitor assumptions and accurate expectations about the experience to come.

A brand should be more than a simple slogan. A brand represents the totality of the thoughts, feelings, associations, and expectations that prospective travelers experience when exposed to a destination’s name, trademark, products, or symbol. The characteristics of a visitor’s experience of a destination should inform the brand, which in turn informs its communications strategies, rather than the other way around. The Foundation will need to undertake a strategic process to determine and articulate its brand.

Brand strategies differentiate destinations in the minds of consumers—shoppers, visitors, and people making business location decisions—and create a sustainable competitive advantage. A brand strategy must be incorporated into all communications with these consumers to maximize its effectiveness. Marketing and communications messages can be developed to convey the benefits associated with

visiting the District and to convey an image and identity that accurately describe the Civil War experience there. Communications range from basic marketing materials to Website content to messages delivered to third-party accomplices such as travel agents and writers, to publicity. In the Shenandoah Valley, clearly, relevant communications go beyond those controlled by the Foundation. The more a region's tourism industry, community and economic development organizations, and private industry understand and support a brand strategy, incorporating it into their promotion efforts, the sooner the market will absorb the brand identity.

These days, establishing a web presence is a key part of creating an effective brand. As tourists flock to the Internet, Websites have become critical vehicles for communicating with potential visitors. A Website can also help to ensure that visitors bring appropriate expectations to the destination experience. For example, visitors need to understand what distinguishes the Valley experience from its competition (including other Civil War destinations that trade on history and scenery), that long distances separate discrete elements of the experience, and that there is a preservation imperative involved. Moreover, Websites need to help would-be visitors plan their vacations and make advance reservations, particularly because some of the District's gems are off the beaten path and the experience would be enhanced by staying at lodging run by independent entities instead of national chains.

For the Foundation, managing the image and communication programs developing a system of tools that can be deployed consistently to reinforce the District's brand identity, whether through physical improvements (e.g., signage) or outreach efforts (printed materials, Website, etc.).

5.7 CREATING A MARKETING PROGRAM

A marketing program for the District will need to determine which diverse markets or "niches" to target—ranging from the group tour industry, to regional residents looking for something new to do within a reasonable drive, to international visitors arriving at Dulles Airport—and then how to communicate messages to each of the selected markets. All aspects of the communications program must be devoted to such messages, including advertising, public relations, and publicity—the "promotion" half of the "marketing and promotion" mantra. Clearly, the Foundation will have to choose how to devote its resources according to technique and target niche, and understand how best to weld its own and its partners' programs into a strategic whole.

Marketing is a complicated discipline that requires years of professional experience to master. Since everyone is bombarded with marketing messages every day, many people believe it to be fairly simple.

Political interference with marketing efforts can often occur, and takes many forms ranging from out-of-hand rejection of a campaign to insistence that a particular attraction be showcased. The Foundation will need to create a marketing plan to remain steadfast as it implements programs and works with myriad partners.

The Management Plan identifies the need to develop a marketing plan. The marketing program should:

- Develop guidelines for an ongoing regional, comprehensive program for marketing and promotion;
- Identify and describe goals or objectives, and use them to evaluate the merits of proposed techniques;
- Outline tasks in order to coordinate and improve marketing and promotion among partners and encourage cooperative efforts, in part by helping to define relationships and roles among partners;
- Identify the best media “buys” and help develop an ongoing decision-making and feedback system for understanding the benefits and efficiencies of given promotional strategies; and
- Recommend steps for the Foundation to take directly and the types of grants, technical assistance, and guidelines or standards to be developed by the Foundation that might most benefit marketing partners.

Key Issues in Marketing

Marketing issues facing the tourism industry and the Shenandoah Valley reflect several common themes. Participants want to use scarce marketing dollars wisely, for example, on state-of-the-art approaches geared towards appropriate markets. There are a number of key issues that should be addressed as the marketing plan is developed:

- **Reliance on technology:** The Internet’s ascent and evolution changes the nature of tourism marketing on an ongoing basis. Virginia enjoys a prominent role in consumer-oriented Internet content, most notably as the headquarters for America Online. Nonetheless, it is difficult for the tourism industry to avoid lagging behind and to make the ongoing investments in e-marketing (and other contemporary tools including database marketing, data mining, and on-line reservation systems) necessary to stay competitive. A major responsibility for the Foundation and its partners entails staying abreast of these developments to avoid wasting money on e-fads

that become outmoded virtually overnight. But if making good decisions is hard enough, securing the financial and human resources necessary to implement them is even harder.

- **Achieving consistency of image and message:** In the Shenandoah Valley, the tourism industry as a whole devotes tremendous resources to marketing, but consistency remains elusive. The result: a cacophony of messages contained in a blizzard of brochures and other media. Duplication of effort and conflicting messages abound, representing a waste of resources that only confuses visitors. Even under the umbrella of the Virginia Tourism Corporation, numerous tourism marketing and promotion efforts compete for visitors' attention. The role for the Foundation? Help the industry work together to market the Valley coherently, resolve these issues, and free up resources that could better be invested elsewhere.
- **Knowing the competition and existing markets:** Without a doubt, the Shenandoah Valley is one of Virginia' marquee regions and the Civil War represents one of its icon themes. Other regions, however, also offer exceptional Civil War visitor experiences and have the capacity to provide an affordable visit on short notice. In the minds of some travelers, visiting Gettysburg, Antietam, and other more familiar sites takes precedence over the Shenandoah Valley Civil War experience. As part of its marketing responsibilities, the Foundation should identify both the market niches that have affinity for the region's particular story and geographic scope as well as determine how to extend the invitation to already captured markets. The Foundation should also determine how to reach the crowds flocking to the Shenandoah National Park, especially those driving along its Skyline Drive, and existing major attractions such as Luray Caverns in order to convey the message that the District's Civil War story merits their attention, their time, and their money.
- **Staying abreast of trends in tourism:** As demographics and consumer preferences change, new and promising markets and market segments emerge, for example, the growing interest in "soft" outdoor recreation (bicycling, hiking). The Foundation should also consider setting up systems to help it and its partners in the Valley tourism industry stay on top of these developments and measure the effectiveness of any new marketing investments made as a result.
- **Reaching national and international visitors:** Visitors to Washington, D.C., especially those from overseas who take longer vacations, represent potentially lucrative markets that, unfortunately, could be expensive to reach. The Foundation should consider piggybacking onto other marketing efforts to attract these markets and avoid creating confusion and disseminating conflicting messages. At a minimum, this would mean participating with Virginia Tourism Corporation staff at Powwow (the annual showcase of American destinations for international tour operators), American Bus Association and other key travel industry meetings, going on

missions overseas to meet with tourism industry leaders, and facilitating “fam” tours for travel writers and others who can bring visitors to the District.

- **Coordinating and monitoring results:** As part of addressing marketing issues, the plan should establish the Foundation’s use of the Integrated Marketing Campaign (IMC) approach, which is an objective process for identifying the aspects of the traveler’s experience to showcase or overcome, associated problems and opportunities, quantifiable objectives, detailed strategies, budgets, and a research program geared towards measuring results and providing accountability. This means adopting a database-driven marketing program with a system that measures results and incorporates the Internet. Rather than supervise numerous service providers working independently (e.g., one for publicity, one for public relations, one for creative copy writing, etc.), all subcontractors could interact under a single IMC management structure run by the Foundation to ensure communication coordination.

Request for Proposals for the District-wide Marketing Plan

Development of a District-wide marketing plan for the Foundation and its partners will require assistance from a consultant recruited through an open process. Requests for proposals (RFP) should target consultants with experience and professional expertise in marketing and promotion. A letter accompanying the RFP should provide background on the project; expected start and finish dates; a contact for further information; and the deadline for the receipt of proposals. The Foundation’s Tourism Committee should interview prospective candidates, and if possible, reveal the target budget, and announce the interview date in the RFP.

The request for proposals should ask candidates to submit the following:

- Qualifications and experience;
- Philosophy and approach;
- Proposed methodology for this particular project;
- Description of and samples of specific marketing plans;
- Relevant experience working with projects with multiple sites and partners;
- Proposed timeline for completion of the plan;
- Proposed budget, including hourly rates for services and an indication of which individuals, if part of a team, will be working on specific aspects of the project; and
- References.

5.8 INITIAL ACTIONS FOR VISITOR SERVICES

Civil War resources represent the District's primary "product"—the reason visitors choose this destination. Protecting and interpreting these resources is the most important task before the Foundation. In the early years, there will be little new to promote, although the Foundation should undertake a marketing plan to bring a marketing perspective to the development and design of the wayfinding system, the District's graphic identity, and early promotional and interpretive materials. In essence, however, the District's interpretation must serve, initially, as a kind of "natural" marketing program. Overselling—too much promotion too soon without solid products—leads to visitor disappointment and the damaging loss of potentially years of good word-of-mouth advertising. The early marketing plan can be updated and expanded over time, and should be in continual use.

The Foundation and its partners should consider the following actions over the next one to three years:

- **Improve interpretive offerings across the District at both battlefields and Civil War-related sites, including interpretive sites and cities and towns.** This is a responsibility of the Interpretation and Education Committee — *Foundation*.
- **Develop and distribute promotional materials, undertake advertising, and maintain a public relations and publicity function for the Foundation.** This is a responsibility of the Tourism Committee — *Foundation*.
- **Create a graphic identity for the District as a whole.** This is discussed as part of the planning for wayfinding section in Chapter 4 and is a responsibility of the Tourism Committee in cooperation with the Interpretation and Education Committee — *Foundation*.
- **Establish the Civil War Orientation Centers.** This is a responsibility of the Interpretation and Education Committee — *Foundation/Partners*.
- **Establish visitor facilities at the battlefields.** This is a responsibility of the Interpretation and Education Committee — *Foundation/Partners*.
- **Develop a marketing plan.** This is a responsibility of the Tourism Committee — *Foundation*.
- **Implement wayfinding program.** This is a responsibility of the Tourism Committee — *Foundation*.

- **Develop additional tourism products by providing technical assistance and placemaking activities — *Partners*.**
- **Foster development of improved hospitality services through training, evaluations, awards, and promotional efforts — *Partners*.**

CHAPTER 6

SUMMARY MATRIX OF RECOMMENDED ACTIONS

6.1 INTRODUCTION

6.2 SUMMARY MATRIX OF RECOMMENDED ACTIONS

CHAPTER 6

SUMMARY MATRIX OF RECOMMENDED ACTIONS

6.1 INTRODUCTION

The Management Plan and the Implementation Plan contain an array of proposed actions that are to be undertaken by the Shenandoah Valley Battlefields Foundation (Foundation) and/or its partners. The following Summary Matrix of Recommended Actions has been prepared to give partners in the Shenandoah Valley Battlefields National Historic District an overview of these actions, help them keep track of the actions, provide a sense of priority and timing, and suggest, at least at this time, whether the Foundation or its partners should be expected to take the lead in launching these actions or programs.

It must be stressed that this matrix is not “cast in stone.” It is intended to be the best thinking at the time it was developed. As more experience is gained in this regional preservation and partnerships, and, as circumstances change, the matrix will need to be updated and revised.

The matrix is organized so that the reader can use it as a worksheet and index to where more detailed descriptions of the actions are located in the Implementation Plan text. The numbers in the left-hand column refer to page numbers in the document where the individual actions are discussed. The actions are grouped by topic. The right-hand column has been left empty so it can be filled in as partners are identified.

SUMMARY MATRIX OF RECOMMENDED ACTIONS

Figure 6.2 Summary of Actions (1 of 5) NANOHAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT Battlefield and Resource Protection

Page #	Action / Lead	Timing	Key Partners
Section 3.5 Battlefield and Resource Protection			
47	Develop a list of parcels to be protected in the District — <i>Foundation</i>	Ongoing	
47	Protect battlefields as opportunities and funds are available — <i>Foundation/Partners</i>	Ongoing	
47	Secure funds for battlefield preservation — <i>Foundation/Partners</i>	Ongoing	
47	Monitor land use and other policies / decisions by all levels of government to ensure that they support the District and the battlefields — <i>Foundation</i>	Ongoing	
47	Prepare (or update) individual battlefield preservation plans for each of the ten District battlefields — <i>Foundation/Partners</i>	1-3 years	
Section 3.6 Agricultural Lands			
50	Encourage Virginia's use of federal farm easement funds for the purchase of conservation easements on battlefields — <i>Partners</i>	Ongoing	
50	Conduct advisory meetings with farming advisory groups, farmers, and farm owners — <i>Partners</i>	Ongoing	
50	Develop educational program for farm advisors and owners — <i>Partners</i>	2-5 years	
50	Undertake pilot program to prepare a county or multi-county agricultural development plan(s) — <i>Partners</i>	-----	
50	Pursue the creation of state legislation that enables local jurisdictions to purchase conservation easements on battlefield land that is already protected through Agricultural and Forestal Districts — <i>Partners</i>	-----	

Figure 6.2 Summary of Actions (2 of 5)
NANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT
Battlefield and Resource Protection (continued)

Page #	Action / Lead	Timing	Key Partners
Section 3.7 Historic Preservation			
52	Fulfill responsibilities outlined in the programmatic agreement for project review under Section 106 of the National Historic Preservation Act — <i>Foundation</i>	Ongoing	
53	Support District partners in procuring state and federal grants, tax credits, and loans for preservation-oriented activities — <i>Foundation</i>	Ongoing	
51	Encourage public plans to address historic preservation needs — <i>Foundation</i>	-----	
52	Develop informational brochure for property owners on the importance of historic resources, especially those from the period of significance — <i>Partners</i>	-----	
53	Write a brochure explaining historic preservation tax credits to private owners and investors — <i>Partners</i>	-----	
52	Inventory related resources and prepare applications for listing resources in the Virginia Landmarks Register and the National Register of Historic Places — <i>Partners</i>	-----	
53	Promote the purchase/donation of preservation (façade) easements by District partners on resources significant to the Civil War — <i>Partners</i>	-----	

**Figure 6.2 Summary of Actions (3 of 5)
 HANDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT
 Battlefield and Resource Protection (continued)**

Page #	Action / Lead	Timing	Key Partners
Action 3.8 Natural and Recreational Resources			
56	Where related to other District programs, allow recreational and natural resource projects to be eligible for Foundation grant funding — <i>Foundation</i>	Ongoing	
57	Assist counties and other jurisdictions in qualifying to obtain funding from the "state side" Land and Water Conservation Fund — <i>Partners</i>	Ongoing	
57	Study and plan for bicycle use in the district and associated parking needs at the battlefields and elsewhere in the towns and throughout the district — <i>Foundation/Partners</i>	1-3 years	
57	Implement the Management Plan's proposed north-south trail — <i>Partners</i>	3+ years	
57	Undertake a county-wide or multi-county regional recreation plan — <i>Partners</i>	-----	
Action 3.9 Community Planning and Design			
59	Where related to other District programs, allow community planning and design projects to be eligible for Foundation grant funding — <i>Foundation</i> .	-----	
59	Support pilot program to inventory community design issues in a town — <i>Partners</i>	-----	
60	Support pilot program to re-design the commercial construction and landscaping around an interchange on I-81 — <i>Foundation/Partners</i>	-----	
60	Identify "byways" for Virginia and federal designation — <i>Partners</i>	-----	
60	Conduct a pilot program to survey historic routes in a county; propose improved VDOT, county, and town road maintenance practices — <i>Partners</i>	-----	
61	Develop a pilot training program in community design for community public officials (appointed and elected), bankers, realtors, and citizen activists — <i>Partners</i>	-----	
61	Study the financial return of community investments in preservation and aesthetic improvements — <i>Partners</i>	-----	
61	Fund an inventory of the details of design policies in place in each town and county — <i>Partners</i>	-----	
61	Write a brochure on the benefits, effective techniques, and Valley examples of good community design — <i>Partners</i>	-----	
61	Sponsor community design plans addressing land use policies, sign controls, design guidelines, streetscape, and other public domain elements — <i>Partners</i>	-----	

Appendix 6.2 Summary of Actions (4 of 5)
INDOAH VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT
Interpretation and Education

ID #	Action / Lead	Timing	Key Partners
Section 4.7 Interpretation			
1	Prepare District-wide interpretive and wayfinding plans — <i>Foundation</i>	Year 1	
2	Erect District entry signs on major transportation routes — <i>Foundation</i>	Years 1-3	
3	Create a "historic routes and towns" driving tour brochure — <i>Foundation/Partners</i>	Year 2	
4	Install signs in areas frequented by visitors to entice them to visit interpretive sites — <i>Partners</i>	Years 2-3	
5	Extend or enhance the Virginia Civil War Trails "Avenue of Invasion" tour route by adding waysides — <i>Partners</i>	Years 2-5	
6	Organize a conference that addresses less-interpreted aspects of the District's stories — <i>Foundation/Partners</i>	Year 4	
Section 4.8 Education			
1	Identify areas where further research is needed for Civil War interpretation and curriculum development — <i>Foundation</i>	Years 1-2	
2	Develop a Civil War unit of the statewide history curriculum for primary and secondary grades, using the District as a classroom — <i>Partners</i>	Years 3+	
3	Support educational and interpretive programs and initiatives for schools (K-12), educational institutions, and continuing education programs — <i>Foundation</i>	Year 3+	
4	Provide matching grants to support education and interpretation — <i>Foundation</i>	Year 3+	
5	Offer interpretive materials and programming developed especially for children and students at the Civil War Orientation Centers and battlefields — <i>Foundation/Partners</i>	Years 3+	

Area 6.2 Summary of Actions (5 of 5)
NANDOA VALLEY BATTLEFIELDS NATIONAL HISTORIC DISTRICT

Visitor Services

Item #	Action / Lead	Timing	Key Partners
Section 5.8 Visitor Services			
97	Improve interpretive offerings across the District at both battlefields and Civil War-related sites, including interpretive sites and cities and towns — <i>Foundation</i>	Ongoing	
97	Develop and distribute promotional materials, undertake advertising, and maintain a public relations and publicity function for the Foundation — <i>Foundation</i>	Ongoing	
97	Create a graphic identity for the District as a whole — <i>Foundation</i>	Year 1	
97	Establish the Civil War orientation centers — <i>Foundation/Partners</i>	Years 1-4	
97	Implement the wayfinding plan — <i>Foundation</i>	Years 1-4	
97	Establish visitor facilities at the battlefields — <i>Foundation/Partners</i>	Years 1-5	
97	Develop a marketing plan — <i>Foundation</i>	Year 2	
98	Develop additional tourism products and undertake placemaking activities — <i>Partners</i>	Year 3+	
98	Foster development of improved hospitality services through training, evaluation, awards, and promotional efforts — <i>Partners</i>	Year 3+	

CONCLUSION

The members of the Commission, together with Commission staff and consulting team, have developed this Implementation Plan in hopes that it will provide guidance to the Foundation in its early years. This is meant as a supplement to the Management Plan, to be a useful document providing detailed ideas and recommended actions. The Management Plan fulfills the Commission's Congressional mandate, but it is a policy plan; the Implementation Plan "colors inside the lines" set forth in the Management Plan.

The Foundation, however, must find its own way. The Commission commends this Implementation Plan to the Foundation in the full realization that actual implementation will provide a basis of experience and support, negotiation and collaboration for the next level of decision-making and action.

There is no shortage of good ideas, here or elsewhere. In the final analysis, the Foundation will be successful in implementing the Management Plan not by good ideas alone, but by undertaking them with great diligence and attention, and remaining open to new opportunities to partner with others. The Commission and all of those associated with the Management Plan have been grateful for the opportunity to set the direction and suggest the path.

The District is a grand idea, one of those "make no little plans" big ideas that few are privileged to set in motion. The Commission wishes the Foundation well in the considerable work ahead to insure that the District lives up to its promise to save battlefields, preserve the character of the District, educate the nation, and serve visitors who seek to learn about and enjoy the heritage of the Shenandoah Valley.

