

# Upper Housatonic Valley National Heritage Area

## Management Plan 2013



*Housatonic River, Kent, Connecticut  
Photograph by the Housatonic Valley Association*



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# Chapter 1: Purpose and Need



*Housatonic River as it winds through the fertile plains of the Southern Berkshires.*

## 1.1 Purpose of this Report

This report is the comprehensive management plan that Section 276 of the enabling legislation (P.L. 109-338) directed the Upper Housatonic Valley National Heritage Area, Inc., to prepare for the Secretary of the Interior. The purpose of the Management Plan is to:

1. define the mission, vision, policies, funding, and programmatic strategies of the organization;
2. provide an interpretive and operational framework that will serve as an agenda for programs and a guide for decision-making for the next five years;
3. establish the roles and actions of partners;
4. and provide an inventory of the resources related to interpretive themes to be protected

The management entity, the Upper Housatonic Valley National Heritage Area, Inc. is typically called "Housatonic Heritage." In this report, the management entity will be called "Housatonic Heritage," and the service area will be referred to as the Upper Housatonic Valley or the heritage area.

## 1.2 Definition of a Heritage Area

A national heritage area is a section of our nation's landscape that has been recognized by the United States Congress for its distinct geography, history,

and culture, as well as for its nationally important resources and contributions. The purpose of a national heritage area is to tell the story of that region in a coherent and meaningful way through activities that foster pride of place and encourage stewardship of its cultural and natural resources for the benefit of future generations. As of April 2012, there are 49 national heritage areas in the United States.

## 1.3 Significance of the Upper Housatonic Valley National Heritage Area

The Upper Housatonic Valley in Connecticut and Massachusetts forms a well-defined landscape and cultural region. Scenic forested hills, open farmland, and meandering rivers surround 29 towns brimming with historic buildings and world-renowned cultural institutions. For over 150 years, this picturesque valley has been one of the country's leading cultural centers and a magnet for writers, artists, and vacationers. Herman Melville, Nathaniel Hawthorne, Edith Wharton, Daniel Chester French, and Norman Rockwell all established homes here. The same land and water that inspired writers and artists made the region a national leader in the marble, iron, and paper industries. A portion of the U.S. Capitol is constructed of marble quarried in Lee, MA. The iron and paper industries played pioneering roles in the



## Chapter 1: Purpose and Need *continued*

Industrial Revolution, and electrical innovations made here enabled the widespread use of electrical power. A thriving electrical equipment industry continued through most of the twentieth century.

While many significant events took place in the Upper Housatonic Valley, several events helped to change the course of American history. Before the American Revolution, in 1773, a group of men gathered at John Ashley's Sheffield, MA, home (now a historic site operated by The Trustees of Reservations) to draft a series of resolutions asserting their "right to the undisturbed enjoyment of their lives, their liberty and property." Known as the Sheffield Resolves, or Sheffield Declaration, this manifesto expressed the natural rights of man which would be articulated in the Declaration of Independence three years later. It is likely that an African American woman named Elizabeth Freeman, known familiarly as "Mum Bett", who was enslaved in the Ashley household, heard the rights declaration. She successfully sued for her freedom from slavery in 1781 in a landmark case that became a catalyst for ending slavery in Massachusetts, making Massachusetts the first state to terminate slavery. During the Civil War, Pittsfield pastor Samuel Harrison, born enslaved, served as the chaplain to the Massachusetts 54<sup>th</sup> regiment. After Harrison protested the unequal pay to the African American soldiers in the Union Army, Congress, in June 1864, granted equal pay for 180,000 blacks who fought for the Union.

The father of the modern civil rights movement W.E.B. Du Bois was born and raised in Great Barrington, MA. Unstructured freedom to roam the hills and riverbanks in his boyhood influenced his life as a thinker, writer, and activist who treasured a healthy environment. In 1930, he urged the Great Barrington town leaders to "rescue the Housatonic and clean it as we have never in all years thought before of cleaning it." With a strong sense of Great Barrington as "home," he happily received the deed to his beloved family homestead as a gift from friends on his sixtieth birthday. Today, the Friends of the Du Bois Homesite are working to restore it.

Historians have contended that the Berkshire County portion of the Upper Housatonic Valley developed its



*W.E.B. Du Bois spent his formative years in Great Barrington. Housatonic Heritage is a key partner in preserving his homesite.*

own identity during the eighteenth and early nineteenth centuries based upon relative rural isolation which fostered a conservative strain in religious matters, populist politics, and a spirit of independent thought.

As an agricultural region, farmers in the Upper Housatonic Valley had an early and keen interest in scientific farming. With the introduction of the Merino sheep in 1807, the region quickly became a national center of sheep raising and woolen cloth production. In 1810, the nation's first county agricultural society was formed at Pittsfield with the purpose of serving both local small farmers and gentry farmers with larger holdings. One year later, the society held the nation's first agricultural fair, called the Berkshire County Fair, in Pittsfield with a procession of thousands of livestock and exhibits on farming improvements. That spirit of agricultural innovation was perpetuated when Egremont farmer Robin Van En began one of the first Community Supported Agriculture (CSA) farms in the United States in 1983.

Scenic beauty has long been a hallmark of the region. When the Laurel Hill Association was established in Stockbridge in 1853, it became the first organization which had as its mission the beautification of a village, its structures, and landscape. A few decades later, wealthy industrialists and financiers who built summer homes in the area purchased large tracts of land to establish nature preserves, prevent development,

## Chapter 1: Purpose and Need *continued*

and maintain vistas. Many of these have formed the core of parks and conservation land within the region. The preserved landscape attracted twentieth-century writers like Hal Borland, *New York Times* nature columnist and resident of Salisbury, CT, who wrote “outdoor editorials” about the surrounding hills, forests, fields, and river, including the National Natural Landmark Bartholomew’s Cobble in Sheffield, MA.

A 2012 economic impact study released by the Berkshire Chamber of Commerce reported that in Berkshire County in 2008, there were 73 arts, culture, and humanity organizations. Together, these organizations generated \$101 million in revenues, took in \$47 million in gifts and grants, spent \$76 million, and had assets of \$607 million. These organizations employed 2,577 people and had an economic impact of \$162 million. The arts and culture sector had the highest growth rate of all regional economic sectors.

### 1.4 Purpose of Housatonic Heritage

Housatonic Heritage’s mission is to preserve this heritage and to and celebrate the cultural and natural resources of the Upper Housatonic watershed. Through its partnerships and collaborations with more than 70 nonprofit organizations, local governments, state and local agencies, and interested individuals, Housatonic Heritage connects organizations and shares resources for heritage and environmental awareness and education. Providing strong support for the work of others has yielded, and will continue to yield, powerful results. The goal of Housatonic Heritage is to ensure that the region’s cultural, natural, and historic resources are conserved for the education and enjoyment of residents and visitors alike, for years to come.

### 1.5 Establishment of the Upper Housatonic Valley National Heritage Area

By 2000, extensive citizen involvement and the establishment of the non-profit Upper Housatonic Valley National Heritage Area, Inc. (UHVNHA) coincided with legislation requiring the National Park Service’s Northeast Region Boston Support Office to conduct a feasibility study to determine whether the region was suitable to be designated formally as a national heritage area. The study report, titled “Upper



*Made of locally quarried marble, Beckley Furnace was one of the largest of the 43 furnaces in the Salisbury Iron District in northwestern CT and southwestern MA.*

Housatonic Valley National Heritage Area Feasibility Study and Environmental Assessment” (2002), concluded that all the criteria for national heritage area were met and recommended its establishment.

The Upper Housatonic Valley National Heritage Area was created by an Act of Congress on October 12, 2006 with the passage of Public Law 109-338. The legislation cited a national heritage area with a distinctive history and geography, nationally important resources, and a story of broad interest to tell. The enabling legislation is in Appendix 1. Congress established the UHVNHA to “provide a management framework to foster a close working relationship with all levels of government, the private sector, and the local communities in the Upper Housatonic Valley region to conserve the region’s heritage” and to assist communities, organizations, and citizens in Connecticut and Massachusetts in “identifying, preserving, interpreting, and developing the historical, cultural, scenic, and natural resources of the region for the educational and inspirational benefit of current and future generations.” (PL 109-338. Sec. 272).

The Upper Housatonic Valley National Heritage Area, Inc. was named as the management entity to coordinate the activities of the heritage area, receive federal and private funds, and develop a management action

## Chapter 1: Purpose and Need *continued*

plan. That organization is typically called “Housatonic Heritage,” and it will be referred to by that name in this report. The National Park Service provides technical assistance and support.

A chronology of the steps toward the establishment of Housatonic Heritage is in Appendix 2 of this report.

### 1.6 Boundaries of the Area

The UHVNHA encompasses 975.2 square miles of the Upper Housatonic River watershed along a sixty-mile stretch of the river as it flows south from Lanesboro, MA to Kent, CT. It meanders through the Berkshire Hills in southwestern Massachusetts and among the Litchfield Hills in northeastern Connecticut. Twenty of the Heritage Area’s 29 towns are in Massachusetts: Alford, Becket, Dalton, Egremont, Great Barrington, Hancock, Hinsdale, Lanesboro, Lee, Lenox, Monterey, Mount Washington, New Marlboro, Pittsfield, Richmond, Sheffield, Stockbridge, Tyngham, Washington, and West Stockbridge. Nine towns are in adjacent Connecticut: Canaan, Colebrook, Cornwall, Kent, Norfolk, North Canaan, Salisbury, Sharon, and Warren. See Map no. 2.

A section of the Appalachian Mountains National Scenic Trail runs the length of the heritage area.

The Upper Housatonic Valley is distinct from the lower Housatonic Valley which stretches from New Milford, CT, south to Stratford, CT. The lower Housatonic is more urbanized and is connected to the Greater New York City Area. The northern part of Berkshire County, including Williamstown, Adams, and North Adams, is within the Hoosic River watershed and, therefore, not in the UHVNHA. The New York State communities on the western edge of the heritage area are located within the Hudson River Valley National Heritage Area.





## Chapter 2: Foundation for Planning



*Housatonic Railroad  
in Lee, MA, in 1911.*

### 2.1 Legislative Requirements

This report is the comprehensive management plan that Section 276 of the enabling legislation (P.L. 109-338) directed the UHVNHA to prepare for the Secretary of the Interior. Specifically, the legislation requires that the Management Report:

1. Include comprehensive policies, strategies and recommendations for conservation, funding, management and development of the Heritage Area; (3.5, 5.2, 5.3, 5.4, 5.5)
2. Take into consideration existing state, county, and local plans in the development of the management plan and its implementation; (4.4)
3. Include a description of actions that governments, private organizations, and individuals have agreed to take to protect the natural, historical and cultural resources of the Heritage Area; (4.5)
4. Specify the existing and potential sources of funding to protect, manage, and develop the Heritage Area in the first five years of implementation; (5.4, Tables 1 and 3)
5. Include an inventory of the natural, historical, cultural, educational, scenic, and recreational resources relating to interpretive themes

established for the heritage area that should be preserved, restored, managed, developed, or maintained; (2.3, 2.4, 2.5, 2.7, Appendix 4)

6. Describe a program of implementation for the management plan including plans for resource protection, restoration, construction, and specific commitments for implementation that have been made by the management entity or any government organization, or individual for the first five years of implementation; (3.3, 4.5, 5.1, 5.2, 5.3, 5.4, 5.5)
7. Include an interpretive plan for the Heritage Area. (2.6, 2.7, 5.3, Appendix 3)

This Management Report has been prepared cooperatively by Housatonic Heritage and the National Park Service's Northeast Regional Office.

### 2.2 Assessment of Existing Resources

A complete inventory of cultural, natural, educational, and scenic resources is in Appendix 4.

### 2.3 Cultural Resources

#### 2.3.1 Prehistoric and Native American Cultural Resources

The Mohican people lived in the woodlands and along the waterways of the Upper Housatonic



## Chapter 2: Foundation for Planning *continued*

Valley for thousands of years before Europeans began to settle in the region in the 1720s. While most Mohican people were pushed out of the Upper Housatonic region by 1800, evidence of their lives here remains. According to archaeologist Timothy Binzen, of the University of Massachusetts Amherst, a total of 218 Indian archaeological sites have been identified in 33 communities in the Upper Housatonic Valley, most of which are in the valley lowland. Archaeologists have not systematically surveyed these Indian sites which have been discovered accidentally and haphazardly. Many sites may have been destroyed by modern development.

There are no publicly identified sacred sites within the heritage area. A small museum of Native American artifacts is part of the Mission House in Stockbridge, a property of The Trustees of Reservations. In recent years, members of the Stockbridge-Munsee community, descendants of those who had lived in western Massachusetts, have begun to reconnect with the region.

As of Spring 2011, the U.S. Department of the Interior Bureau of Indian Affairs lists no federally recognized tribes within the 29-town region of the Upper Housatonic Valley National Heritage Area. The *Tribal Leaders Directory* lists four tribes within Connecticut and Massachusetts, but none claim lands within the Upper Housatonic Valley region.

### Connecticut - Two Federally Recognized Tribes

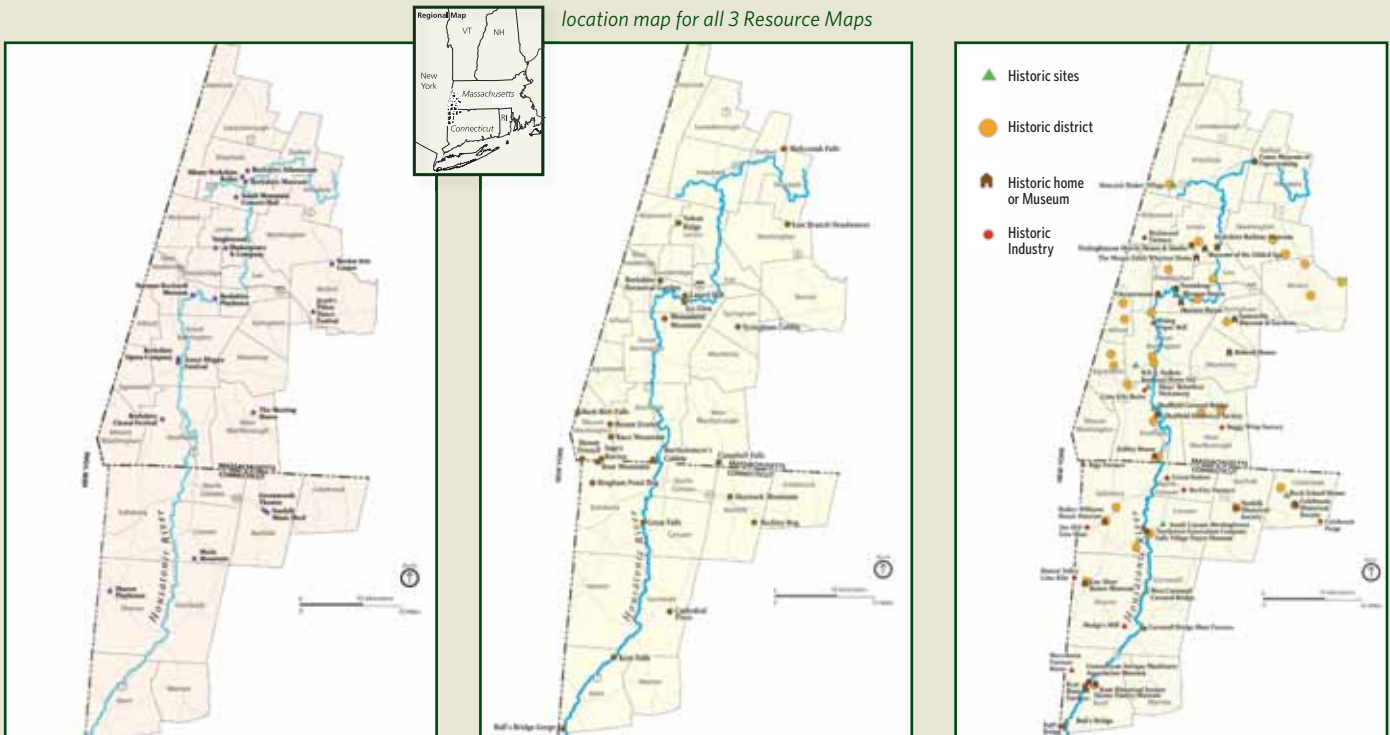
1. Mashantucket Pequot Tribe of Connecticut
2. Mohegan Indian Tribe of Connecticut

### Massachusetts - Two Federally Recognized Tribes

1. Mashpee Wampanoag Tribe
2. Wampanoag Tribe of Gay Head (Aquinnah) of Massachusetts

Further, the Bureau of Indian Affairs does list the following Indian community (formerly from the Upper Housatonic Valley region) as recognized and eligible to receive services from the United States Bureau of Indian Affairs. However, this tribe has no federally

location map for all 3 Resource Maps



## Chapter 2: Foundation for Planning *continued*

recognized lands in the communities of the Upper Housatonic Valley National Heritage Area.

- Stockbridge Munsee Community, Wisconsin

### 2.3.2 Historic Resources

A thematic history of the Upper Housatonic Valley is in Appendix 5.

The Housatonic Heritage area has a dense concentration of significant eighteenth and nineteenth-century architecture. Almost every town has a traditional early nineteenth-century town center with a white clapboarded church, town hall, library, and historic commercial and residential structures, all surrounding or near the central common area or “green.” One of the catalysts to the preservation of village centers has been the establishment of Stockbridge’s Laurel Hill Association in 1853 for the purpose of beautification of the town. Other towns followed suit by establishing their own beautification organizations which planted trees, turned rough common areas into park-like settings, and installed street lamps, fountains, and decorative fences. Pittsfield boasts Wahconah Park which is one of the last remaining baseball parks with wooden stands. Opened in 1919, it has hosted minor league baseball virtually continuously to the present day.

Nearly 200 historic resources within the heritage area have been recognized at the federal level as significant.

- **National Register of Historic Places.** A total of 123 resources are individually listed, including houses, farms, estates, churches, public buildings, bridges, camps, resorts, railroad stations, schools, cemeteries, and industrial sites. Among the most prominent industrial sites are the Beckley Forge in North Canaan, CT, where eleven tons of iron were produced daily in the mid-nineteenth century; Crane Paper Company in Dalton, MA, where U.S. currency paper has been made since the mid-nineteenth century; and Kent Iron Furnace in Kent, CT, which produced iron from 1825 to 1892, contributing to the Industrial Revolution.



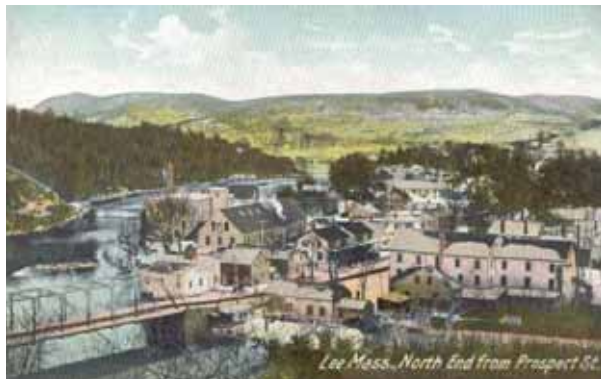
*On the Housatonic in Dalton, MA, the Crane Museum of Papermaking is housed in the former Rag Room of the 1844 stone mill.*



*In Lenox, MA, Edith Wharton's Mount is a National Historic Landmark.*



*The Mission House in Stockbridge, MA, tells the story of John Sargeant's work to convert the Stockbridge Mohicans to Christianity.*



*In its heyday, there were 25 paper mills in Lee, MA, lining the Housatonic River.*



## Chapter 2: Foundation for Planning *continued*



*Teachers in the Upper Housatonic Valley Experience program at Hancock Shaker Village.*

■ **National Register Historic Districts.** There are 33 in the area. Sharon Valley Historic District in Sharon, CT, is a former industrial community with historic workers' housing, bridges, and industrial facilities for iron mining and refinement. The South Lee, MA, Historic District features 18 nineteenth-century commercial structures, houses, and government buildings dating from when the paper industry supported a prosperous town center.

■ **National Historic Landmarks** This designation requires a higher level of significance and nine sites in the Housatonic Heritage area have received it. The national historic landmarks include: The Mount in Lenox, Massachusetts, which was the summer home of Edith Wharton whose novels *Ethan Frome* and *Summer* were set in the Berkshires; the Mission House in Stockbridge, which was erected in 1739 as the home of the minister hired to convert local Indians to Christianity; Crane and Company's Old Stone Mill in Dalton, Massachusetts, which is now a papermaking museum at the oldest active paper company in the country and manufacturer of the paper for U.S. currency; and the



*The Berkshire Museum in Pittsfield, founded in 1903 to bring the wonders of the world to western Massachusetts, is a partner in aiding small museums to preserve their collections.*

site of W.E.B. Du Bois's boyhood home in Great Barrington, Massachusetts.

In addition there are 24 historical and cultural museums, with 16 in Massachusetts and 8 in Connecticut, ranging in size from volunteer-managed local historical societies to the larger museums like the Berkshire Museum of art, history, and natural science in Pittsfield, and the outdoor museum Hancock Shaker Village which has a collection of 22,000 Shaker and Shaker-related artifacts, including the iconic 1826 Round Stone Barn.



## Chapter 2: Foundation for Planning *continued*

Several thematic trails, including the Tri-Corners Ethan Allen Trail, the African American Trail, the Iron Heritage Trail, and the Paper Trail, highlight the historical significance of specific aspects of life and industries which were spread across a broad area. Local libraries have extensive resources on local history, including the Sharon Historical Society, the Scoville Memorial Library in Salisbury, CT, and the Stockbridge Library, Museum and Archives which holds nationally famous collections such as Puritan minister Jonathan Edwards's writing desk (mid-18th century) and the doll that inspired Rachel Field's Newbery Award-winning novel *Hitty: Her First Hundred Years*, published in 1929. The Berkshire Athenaeum in Pittsfield has a room devoted to Herman Melville and local authors.

### 2.4 Natural Resources

#### 2.4.1 Geologic Resources

It is believed that the Housatonic River formed over 50 million years ago to the north of the Hudson Valley in New York State. When erosion gradually caused the Hudson to break through to the Housatonic's headwaters, the Housatonic was left smaller and with a new source in the area that is now Massachusetts.

Most of the valley is underlain by metamorphic rock, mainly gneiss and schist, that was formed during the collision of the North American continent with Europe and Africa some 300 to 400 million years ago. The intense pressure of the collision hardened the rock and caused it to fold and fault, forming the steep mountains found in parts of the valley. Some portions of the valley, notably north of Falls Village and south of Cornwall Bridge, CT, are underlain by marble, giving it the name the "Marble Valley." During the Paleozoic era, seas covered a large portion of the valley, leaving sedimentary rock comprised of carbonate mud, shells, and marine fossils, materials which later formed limestone. Metamorphism turned this limestone to marble. Above the bedrock is found glacial drift, made of sand, silt, and boulders. Melting glaciers spread the drift across the terrain as they receded over 18,000 years ago.

#### 2.4.2 Geographic Area

The exact origin of the Mohican word Housatonic is debatable. The Mohican group of the Algonkian



*Monument Mountain, once a hiking place of Hawthorne and Melville, was nearly deforested to supply timber for the valley iron furnaces.*



*Marble quarried in Lee was used in the U.S. Capitol. Lee Marble Quarry, 1905. Reproduced from an original postcard published by the Hugh C. Leighton Company, Portland, Maine.*

Indians named the river "usi-a-di-en-uk," which, according to popular interpretations, means "beyond the mountain place." But Mohican language scholar Lion Miles, claims that the term is closer to meaning "place of stones," because the root word in "Housatonic" means stone, which undoubtedly refers to the stony river bottom, stony soil, and rocky hills.

## Chapter 2: Foundation for Planning *continued*



*Volunteers planting a riparian buffer along the Housatonic River at Old Mill Trail, Hinsdale, MA, in cooperation with Housatonic Valley Association*

One of the features of the river is its successive drops which made excellent water power for industry. The main stem of the Housatonic River is formed by the joining the East, West, and Southwest Branches in the vicinity of Pittsfield. The East Branch begins at Muddy Pond in Hinsdale and Washington and flows approximately 17 miles, falling 480 feet before merging with the West Branch. Outflows from Pontoosuc Lake in Lanesboro and Onoto Lake in Pittsfield combine to form the West Branch, which falls 140 feet before joining the East Branch. The Southwest Branch originates at Richmond Pond in Richmond. The main stem courses in a southerly direction 132 miles to its outfall in Long Island Sound at Milford Point in Connecticut; its overall drop is 959 feet in elevation.

From its headwaters at Mt. Greylock, flowing south toward Great Barrington, the Housatonic River makes several steep descents through the narrow valley where commercial and industrial development has sprung up. Below Great Barrington, the valley flattens and broadens to a width of about 14 miles. Here, the river meanders through rich farmland to Falls Village, CT. To the east, the Berkshire

Plateau reaches 1,500 to 1,800 feet, and to the west the Taconic range reaches over 2,000 feet. As the Housatonic River enters Connecticut, the valley walls narrow dramatically, with mountains rising to almost 2,000 feet (Bradford Mountain is 1,912 feet elevation). The river flows through a harder substrate of limestone, quartz, and granite, and the river bottom becomes rockier.

Major communities of the Upper Housatonic Valley watershed region are situated in the valley along the river and connected by U.S. Route 7, the major north-south corridor in western New England.

### **2.4.3 Ecosystems**

There are three ecosystems in the Upper Housatonic Valley: Western New England Marble Valleys, which covers the largest part of the Upper Housatonic Valley; Berkshire Taconic Landscape, at the southwest corner of Massachusetts and the northwest corner of Connecticut along the New York border; and Lower Berkshire Hills in northwestern Connecticut.

- 1. The Western New England Marble Valleys** are home to a total of 116 rare plant species, more



## Chapter 2: Foundation for Planning *continued*



*Mapleash swamp in the Schenob Brook wetland region near the townships of Mount Washington & Sheffield, MA*

than any other eco-region in Massachusetts. Among the most important critical habitats are the marble ridges and ledges, caves, calcareous wetlands, and lakes and ponds found in the central portion of the watershed. Since the soil and surface water is less acidic, these areas are rich in nutrients and are especially suited to agriculture.

- 2. The Berkshire Taconic Landscape**, with 48 rare plant and animal species, supports black bear, mink, bobcat, fisher, and migratory songbirds. The Berkshire Taconic Landscape contains one of the largest, healthiest, and most diverse forest areas in southern New England.
- 3. The Lower Berkshire Hills** ecosystem has 29 rare plant and animal species in its forested towns situated at 1,000 to 1,700 feet elevation. Marble ridges and ledges, such as Bartholomew's Cobble in Ashley Falls, MA, the Great Falls area in Canaan, CT, and the Bull's Bridge area in Kent, CT, support many types of uncommon ferns. Bats, invertebrates, and salamanders live in caves, predominantly in Salisbury.

The Valley's wetlands are considered some of the best global examples of calcareous or "sweet" water wetlands, according to the Nature Conservancy. The calcareous wetlands include Robbins Swamp in Canaan, CT, and Beeslick Pond and State Line Swamp in Salisbury, CT, which attract an abundance of insects and game and nongame bird species while supporting such diverse plant species as the spreading globe flower and showy lady's slipper. Hard-water lakes and ponds, such as Twin Lakes in Salisbury and Mudge Pond in Sharon, CT, provide the ideal environment for unique aquatic plants and algal and fish species.

Other habitats include floodplain forests, of which only remnants remain from Falls Village to Kent. High summits of windswept mountains dot the region. Sparsely vegetated with low-growing woody and herbaceous plants, lichens, and mosses, they support some species which are quite rare in southern New England. Black spruce bogs, such as Bingham Pond in Salisbury and Spectacle Pond in Kent, are poorly drained acidic wetlands with a luxuriant cover of mosses, black spruce, and larch. The bog areas are extremely fragile.

The area is distinguished by several national natural landmarks including: Bartholomew's Cobble in



## Chapter 2: Foundation for Planning *continued*



LEFT: Massachusetts' highest single drop waterfall in Bish Bash Falls State Park, Washington, MA.

RIGHT: Canoeing on the Housatonic at Bartholomew's Cobble in Sheffield, MA.

Sheffield, MA, which possesses the greatest natural concentration of ferns in the U.S.; Beckley Bog in Norfolk, CT is the most southerly sphagnum-heath-black spruce bog in New England; Bingham Pond Bog, Salisbury, CT, an extremely rare undisturbed cold Northern spruce bog; and Cathedral Pines in Cornwall, CT, the largest stand of old-growth white pine and hemlock forest in New England.

About 50 large elm trees that survived Dutch elm disease have inspired the formation of the organization Elm Watch, which operates under the umbrella of the Berkshire Taconic Foundation. It began as an all-volunteer group in 1999 to protect remaining elms and promote the planting of disease-resistant elm specimens.

### **2.4.4 Conservation Areas for Public Enjoyment**

In the Housatonic Heritage area, tens of thousands of acres of the natural environment are well

preserved within many conservation areas managed by the states of Connecticut and Massachusetts, land trusts, and nonprofit organization. Connecticut has several state parks and forests in the region, including Housatonic Meadows, Kent Falls, Macedonia Brook, Campbell Falls, Dennis Hill, Haystack Mountain, Lake Waramaug, Algonquin, and Mohawk. The Massachusetts state parks and forests include Bash Bish Falls, Beartown, Jug End, Mount Everett, Mount Washington, Pittsfield, Wahconah Falls, and October Mountain. Several of these state parks and forests have significant natural and architectural resources, built by the federal Civilian Conservation Corps during the 1930s, which have been inventoried by the Massachusetts Department of Environmental Management.

There are Massachusetts Audubon Wildlife Sanctuaries in Pittsfield (Canoe Meadows, which is on property once owned by writer Oliver Wendell Holmes, Sr.) and Lenox (Pleasant Valley). The National Audubon Society possesses two nature sanctuaries in Sharon, CT. The Trustees of Reservations, of Massachusetts, manages six nature conservation areas, including Monument Mountain, Tyringham Cobble, and Bartholomew's Cobble. The Nature Conservancy has extensive holdings in the southwest corner of Massachusetts and the northwest corner of Connecticut, including Mount Plantain Preserve, Tatkon Preserve, and the Roger and Virginia Drury Preserve. In recognition that the Berkshire Taconic landscape contains an intact ecosystem of old second-growth forests (with remnants of stands between 300

## Chapter 2: Foundation for Planning *continued*

and 500 old), the Nature Conservancy designated the area as one of Earth's "Last Great Places."

### 2.5 Recreational Resources

Over 100,000 acres of public land within the Housatonic River watershed offer hiking, camping, winter sports, hunting, fishing and other water-based activities. There are 57 state recreational and land conservation properties in the heritage area, including 42 parks, reservations, wildlife management areas, forests, natural heritage areas, and a sanctuary in Massachusetts. There are 15 forests, parks, and wildlife management areas in Connecticut. A national treasure, the Appalachian Trail runs north-south through the heritage area and offers breath-taking views of the Housatonic River as it passes through Sharon, Cornwall, and Kent. Extensive hiking and mountain biking trails, including among many others the Mohawk, Skyline, and Taconic trails, wind their way through the Housatonic watershed. Designated pedestrian trails include the Ashuwillticook Rail Trail, which also allows cycling, and the Housatonic River Walk in Massachusetts. "Bicycling through the Berkshires" is a 2009 plan to build a multi-use trail through Massachusetts and the heritage area from Vermont to Connecticut. A Housatonic Heritage committee is currently focused on developing the same trail for Connecticut.

Two roads in the National Scenic Byways Program, Jacob's Ladder and Mount Greylock, take drivers through either small towns dotting historic Route 20 in the Berkshires or through a corner of Housatonic Heritage Area and up to Mount Greylock, the highest point in Massachusetts.

The Housatonic River provides opportunities for kayaking, tubing, boating, or swimming. There are white-water runs for the more advanced kayakers. Fishing for trout, bass, and perch along the river is a popular activity. Within the heritage area, state Wildlife Management Areas, such as the George L. Darey Housatonic Valley WMA located in Pittsfield, Lenox, and Lee, and the Housatonic River WMA in Cornwall and Kent, allow hunting and fishing. Most state parks bordering lakes and ponds allow fishing as well. Catch and release fishing areas are located



*Mountain biking along the river*



*Fishing the Housatonic River*



*Jiminy Peak night skiing*

on the Housatonic River at the towns of Lee and Stockbridge. There are six ski resorts in the heritage area, five in Massachusetts and one at Mohawk Mountain in Connecticut.

Two visitor centers operate within the heritage area: the Berkshire Visitors Bureau in Massachusetts and



## Chapter 2: Foundation for Planning *continued*



*Daniel Chester French spent many summers working at his Chesterwood studio in Stockbridge, MA.*

the Litchfield Hills Visitors Bureau in Connecticut. While each agency primarily focuses promotion on its own state, the visitor centers and Housatonic Heritage work together to promote a unified regional experience that de-emphasizes state boundaries.

### 2.6 Interpretive Themes

Housatonic Heritage's mission and programming is built upon the exploration of four key interpretive themes that were identified during the 2002 Feasibility Study conducted by the National Park Service. The 2002 themes are: 1) cultural resort; 2) shaping a scenic landscape; 3) cradle of industry; and 4) Revolutionary War era and the development of democracy. In the decade that has followed the completion of the Feasibility Study, the four themes have proven practical and functional, as well as a good foundation for most programs. Now, however, the themes are in need of expansion to reflect more accurately the evolution and increased breadth of the heritage area's programs. Below, the titles of three themes have been slightly adjusted while one title remains the same:

#### 2.6.1 Creating a Cultural Center (formerly Cultural Resort)

Since the first half of the nineteenth century, this picturesque area's attraction of America's most notable



*Norman Rockwell's Studio at the Norman Rockwell Museum in Stockbridge, MA.*

writers, performers, and artists, has turned the Upper Housatonic Valley into a nationally recognized center for the literary, visual, and performing arts. While living in Pittsfield, Herman Melville wrote *Moby Dick* (1851) and at Stockbridge, Nathaniel Hawthorne penned *House of the Seven Gables*, completed the same year. Later in the century, the region was home for Oliver Wendell Holmes, Sr., Henry Wadsworth Longfellow, and novelists Catharine Maria Sedgwick, Edith Wharton, and James Thurber. Prominent artists came too. Daniel Chester French lived half the year at



## Chapter 2: Foundation for Planning *continued*

his Stockbridge estate and studio Chesterwood, a few miles from where Norman Rockwell later established his studio. Many of the artists in the Hudson River School came east to the Upper Housatonic Valley to paint its rugged hills and vistas. Thomas Cole, Frederic Church, John Kensett, and Asher B. Durand all painted in the Upper Housatonic region between the 1830s and the Civil War.

The success of this first wave of writers and artists enhanced the region's reputation as a pastoral wilderness where creative minds could live and work harmoniously with nature and culture. The well-deserved reputation continues to attract writers, artists, and craftspeople to the valley today. For a decade between 2001 and 2011, the Artist Storefront Project in Pittsfield attracted visitors to downtown to see artists working rent-free in vacant stores. The enthusiasm for that project sparked other creative activities and that city's rejuvenation.

In the late nineteenth century, artists and writers publicized the region's virtues, and wealthy city dwellers followed to build ostentatious country estates. More than 75 "cottages" (some with as many as 100 rooms) were built in Lenox and Stockbridge by industrialists and financiers like George Westinghouse, Andrew Carnegie, and members of the Vanderbilt and Whitney families. These part-time residents patronized the arts, particularly music, and inspired a growing audience of vacationers from the upper and middle classes to soak up the arts in the fresh air while escaping the hustle-bustle of Boston and New York. South Mountain Concerts was founded in Pittsfield in 1918 by music patron Elizabeth Sprague Coolidge. During the 1930s, Tanglewood was established as the summer home of the Boston Symphony Orchestra. It was soon joined by Music Mountain, the Norfolk Music Festival, and the Berkshire Choral Festival. Composer Charles Ives brought more attention with "The Housatonic at Stockbridge," a work created in 1911 for his orchestral set "Three Places in New England."

Today, the Upper Housatonic Valley enjoys its reputation as the premier area for unparalleled year-round cultural events. Tanglewood, Jacob's Pillow Dance



*Bagpipes at sunset at Bartholomew's Cobble, a Natural National Landmark in Sheffield, MA. It is managed by The Trustees of Reservations.*

Festival, Shakespeare & Company, and the Berkshire Theatre Festival, operate on a rich cultural landscape that includes many smaller theatre groups that attract visitors and local residents. In Berkshire County alone, the creative economy generates 6,000 jobs and millions of dollars in revenue for other businesses. The May 2012 *Smithsonian* magazine named Great Barrington the best small town in America, cleverly describing it as: "big-city smart meets New England natural in an art-rich mountain setting."

### **2.6.2 Connections to the Land. (formerly Shaping a Scenic Landscape)**

Long before white settlers arrived, Native Americans inhabited the Upper Housatonic Valley. They fished, hunted, and burned large swaths of land to facilitate agriculture, gathering, and hunting. Their seasonal travels for game, fish, plants, and social events took place on overland and riverside trails they created along the easiest topographical routes. The trails became horse and cart paths over which the English moved in, and many now serve as the courses for our most heavily traveled routes, such as Route 7. In the eighteenth century, Native Americans were both pressured and forced by displaced Indian groups and the English to move out of the area. Beginning in the 1720s, the English partitioned and cleared the land for grazing and farming.

Many of the trees farmers didn't clear, the iron industry, beginning in the mid-eighteenth century, felled to burn for charcoal to fuel iron furnaces. Extracting iron

## Chapter 2: Foundation for Planning *continued*

from the land, principally in Connecticut, reshaped the land's contours. Later, with the advent of the use of wood pulp in the paper-making industry, trees were so depleted that by 1850 three-quarters of the region was deforested. Today, three-quarters of the land is covered with trees.

The Housatonic River and its tributaries, with steep drops in elevation, were the backbone of industrialization, supplying waterpower for early textile mills and later for paper mills. The river was dammed along its length, and storage reservoirs were built at its headwaters to power mills during the dry summer season. It was the Western Railroad in the 1830s and 1840s that significantly opened Berkshire County to the outside world, bringing in people and raw materials and carrying out finished products and agricultural goods for nearby factory towns. An engineering marvel once considered impossible to build, the Western Railroad was the first rail line in the world to cross over a mountaintop; the line began at near sea level in Boston and climbed over 1,700 feet to the summit in Washington, MA. Several of the stone arch bridges that engineer George Washington Whistler (father of painter James McNeill Whistler) constructed over the Westfield River are still in use by the CSX Railroad today. By 1842, the Housatonic Railway carried passengers daily from Bridgeport, CT, north along the Housatonic River to the Massachusetts line. It played a major role in the success of the iron and marble industries.

Land preservation has been a priority among residents for over one hundred years. Toward the end of the nineteenth century, the owners of the expansive manicured estates purchased large tracts of land from impoverished farmers to establish extensive nature preserves. Carriage drives on Monument Mountain in Great Barrington allowed the public to enjoy the mountain scenery. By the early twentieth century, many families donated their estates to become state parks and forests. As the conservation movement gained momentum in the second half of the twentieth century, state governments and nonprofits like the Nature Conservancy and the Audubon Society acquired land and restored natural landscapes. Since 1967, the Berkshire Natural Resources Council (BNRC), and the



*Flag Rock, Great Barrington, MA.*

land trusts that its efforts have spawned, has worked to preserve threatened lands, placing special emphasis on farms, forests, streams, and ridgelines. Today, BNRC owns and manages 7,999 acres and protects an additional 10,011 acres through conservation restrictions. Most towns in Massachusetts and Connecticut have a politically active local and regional land trusts with the result that large portions of many towns' total areas are preserved as open space. By 2009, at least one third of the total land in three Connecticut towns was preserved open space: Canaan (43%); Kent (34%); and Cornwall (34%).

Since 1941, the Housatonic Valley Association has worked to conserve the natural character and environmental health of this region by protecting and restoring the lands and waters of the Housatonic watershed. Headquartered in Connecticut, the organization has offices in Massachusetts and New York. Today, brochures made by the Housatonic Valley Association with the support of Housatonic Heritage inform people how best to enjoy paddling on or walking near the river. The Housatonic River Initiative (HRI) is a non-profit coalition of Berkshire County residents formed in 1992 to work to reclaim the Housatonic River system from years of neglect and decades of toxic PCB contamination. Housatonic River Restoration, Inc. has inspired efforts to clean up

## Chapter 2: Foundation for Planning *continued*



*Taconic Crest Trail  
in MA*

the Housatonic River and make its riverside a place of enjoyment for the public. Their 1999 Housatonic River Restoration Plan represents the voices of over one thousand citizens and their hopes for a clean river with access for recreation.

Towns were self-consciously beautified the same way the rural land was. The Laurel Hill Association became the nation's first village improvement society in 1853 when it was established to "tidy up" Stockbridge by promoting shade trees, mowed lawns, and park-like settings. The fresh-faced charm of Stockbridge was catapulted into the national imagination as the iconic American small town when Norman Rockwell incorporated images of the townscape and the faces of its residents in his best-loved paintings.

The country's first modern mountain crossing for automobiles was created in 1910 with the paving of U.S. Route 20 which was called the "Jacob's Ladder Trail." The idea came from Lenox summer resident Cortland Field Bishop, of The Winter Palace, whose vision was to make the 1,775 foot summit passable for motorists. It is now Jacob's Ladder Scenic Byway which runs through Lee and Becket. The Appalachian Trail was laid out between 1928 and 1945.

The establishment of farms to satisfy niche markets and CSAs beginning in the 1980s helped to return vacant farmland to active farming.

### **2.6.3 Cradle of Industry**

Iron and paper, two of America's earliest industries, were rooted in the Upper Housatonic Valley. The discovery and extraction of high grade iron ore in the Salisbury district (northwestern Connecticut, southwestern Massachusetts, and a section of bordering New York), beginning in the 1730s, prompted several men to establish forges and furnaces that manufactured cannon and supplies for the Continental Army during the American Revolution. In the nineteenth century, the iron industry turned out armaments, train wheels, and tools. At its peak production, there were 43 blast furnaces in the Salisbury Iron District: 22 in Massachusetts and 21 in Connecticut. Founded in 1836, the Housatonic Railroad moved iron and marble from the region to the port at Bridgeport, CT. The last iron furnace closed in 1923.

With the introduction of the Merino sheep, known for its fine soft wool, into the region in 1807, the factory-woven woolen cloth industry flourished; it was supported by vast numbers of sheep farms in the



## Chapter 2: Foundation for Planning *continued*



*Farm in Kent, CT*

Massachusetts and Connecticut hills. Unfortunately, most of New England and the upper Midwest were overrun with sheep farms, causing the price of wool fluctuated wildly. When textile factories moved south in the early years of the 20th century to take advantage of cheaper labor, local factories began to close until the last one was shuttered in the early 1950s. Orders for woolen army blankets during World War II provided a short-lived spike in production.

The founding of Crane & Company in Dalton, MA, in 1801, established the papermaking industry in the valley. With pure water, labor, and machining shops, other factories followed until, by the 1840s, the southern Berkshires had become the center of the country's paper industry. While the region is best known for fine stationery and cotton papers (paper for U.S. currency has been made by Crane since 1879), the nation's first wood pulp paper operations was started in Curtisville and Lee in 1867. In the late 1920s and 1930s, local artisanal papermaking inspired the nation's rebirth of the craft of making paper by hand.

Lime was mined and processed in upland Berkshire County. Used to make mortar, plaster, and glass, lime was an essential ingredient in paper manufacturing because it broke down rag fibers and acted as a bleaching agent. Zenas Crane began using chloride of lime in 1839 as a bleaching agent for removing dye from rags to make pure white paper. In Sheffield, on property that is now the Mass Audubon Lime Kiln Farm Wildlife Sanctuary, limestone was quarried and turned into lime in a kiln that still stands. Visitors can walk among the limestone ridges and outcrops.

In Great Barrington, William Stanley demonstrated the first successful alternating current (AC) transformer in 1886, which advanced the development of long-distance electrical transmission. Four years later, Stanley opened a factory in Pittsfield that became a major manufacturer of electrical generation equipment. In 1894, he demonstrated the first long-distance (seven and a half miles) transmission of alternating current in Great Barrington. General Electric bought Stanley's firm in 1907. During World War II, the plant employed as many as 14,000. The Pittsfield plant was

## Chapter 2: Foundation for Planning *continued*

a major electrical equipment producer as well as a site of important innovations in plastics, such as Lexan, a virtually unbreakable plastic resin used in automobiles, airplanes, and construction materials. The plant's purchase and transfer of many functions elsewhere (as many as 10,000 jobs were lost) in recent years has been a severe economic blow to the region.

### **2.6.4 The Pursuit of Freedom & Liberty (formerly The Revolutionary War Era and the Development of Democracy).**

Many nationally significant events that ushered in new eras of personal and political freedom, religious tolerance, enfranchisement, and civil rights took place in the Upper Housatonic Valley. Historians surmise that the region's relative isolation and small populations led to a spirit of independence that inspired enslaved and subordinated residents to demand freedoms.

In 1773, a group of men gathered at John Ashley's Sheffield house (now managed by the Trustees of Reservations) to draft a petition of grievances against British rule and a manifesto for individual rights, known as the Sheffield Resolves. The document's expression of natural rights would be echoed in the Declaration of Independence three years later. In July 1774, a Berkshire County convention met at Stockbridge to adopt the first absolute prohibition of relationships with Great Britain and a boycott of British goods. A month later, some 1500 men, angered over the Intolerable Acts and other restrictive British measures, protested against the Crown by refusing to let the British-appointed judge hold court in Great Barrington.

During the American Revolution, militias from Ethan Allen's original home in northwestern Connecticut joined the "Green Mountain Boys" (from what is now Vermont) in their capture of Fort Ticonderoga in upstate New York in 1775. General Henry Knox and his American soldiers loaded the confiscated British cannon on ox-drawn sleds and dragged them 300 miles across the Berkshire Hills in winter. Their course was along modern-day Massachusetts State Route 23 (the exact route has been traced by a local historian), now known as the Knox Trail, and is part of the heritage area. When the Americans reached General



*Colonel Ashley house in Sheffield, MA, where Mum Bett was enslaved.*

Washington's command at Dorchester Heights in 1776, the British withdrew their occupation of Boston and fled to Halifax. The Salisbury iron industry provided 75 percent of the cannon and armaments used by the Continental Army.

Following the Revolution, when deep economic depression and extensive mortgage foreclosures sparked Shays's Rebellion among impoverished farmers in western Massachusetts, Sheffield and Stockbridge were the scenes of pitched conflict and court disruptions.

1783, Elizabeth Freeman, enslaved to John Ashley, used the natural rights argument in a lawsuit brought against Ashley in which she sued for her freedom. The courts granted her freedom in this landmark case. With the knowledge that slavery was no longer legally defensible in the state, Massachusetts slaveholders began to free their slaves. Massachusetts became the first state where slavery was no longer supported by the law, and



## Chapter 2: Foundation for Planning *continued*



*The farm at Hancock Shaker Village. The Shakers were known for agricultural experimentation and the invention of farm technology.*

effectively, abolished. Samuel Harrison, born a slave in 1818, was the eloquent minister of the Second Congregational Church in Pittsfield who became nationally known as a writer and lecturer against racism and bigotry. When he confronted the Union policy of paying African American soldiers in the Civil War less than white soldiers, Congress established equal pay. Churches in the region, both white and African American, played a strong role in abolition and civil rights.

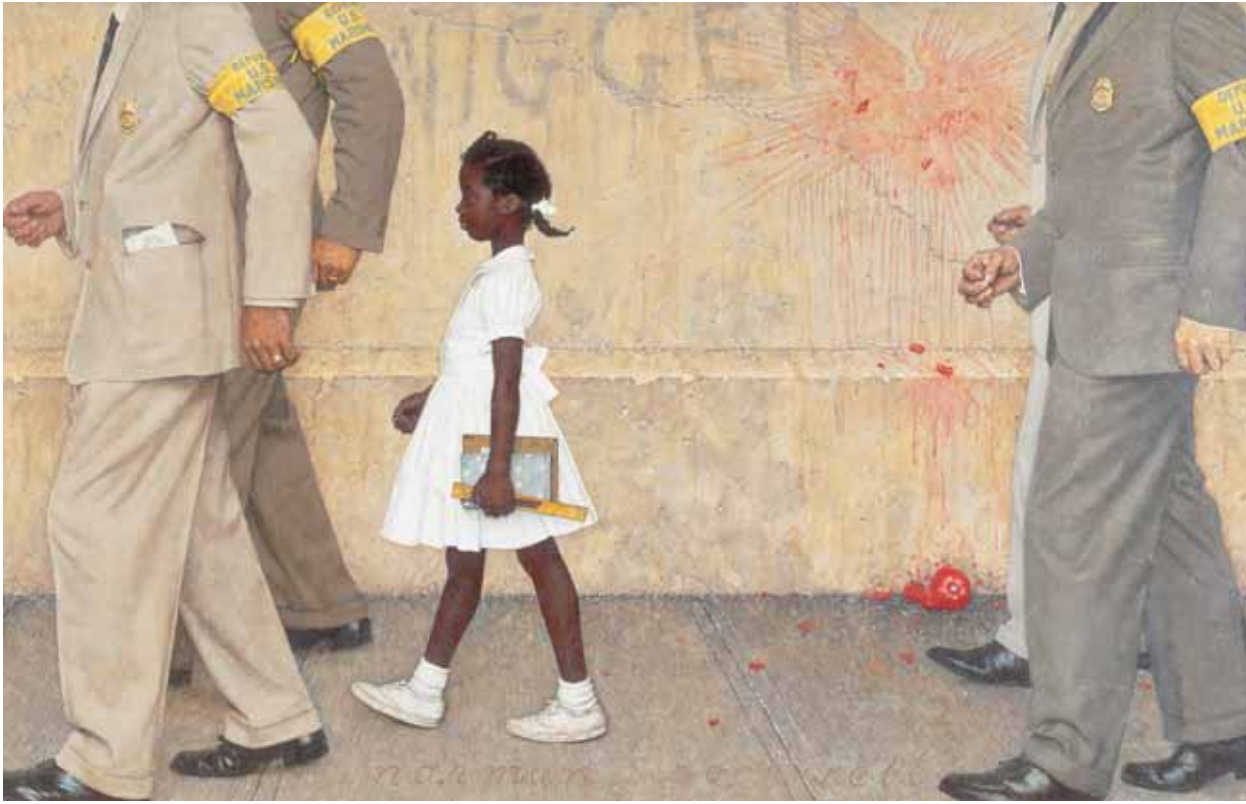
By the late eighteenth century, religious expressions in America grew more diverse and intense. Religious freedom flourished in the valley as the Shakers acquired farmland in both Tyringham and Hancock on which to build utopian communities. They planned to live a “perfect” Christian life based on celibacy, communal living, and the confession of sin. They sought spiritual and temporal simplicity, meekness, pacifism, and perfection in all aspects of

their lives; their architecture, crafts, woodworking, and food industries embodied these spiritual beliefs. Population of the Hancock Community, which owned 3,000 acres, peaked at 300 Believers in 1830. The utopian village closed in 1960. It is now Hancock Shaker Village museum.

Several important civil rights leaders lived in Berkshire County. Pioneer civil rights leader W.E.B. Du Bois (1868-1963) was born, spent his earliest years, and graduated high school in Great Barrington. He retained a deep affection for the town. Another early NAACP leader, James Weldon Johnson, lived part-time in Great Barrington. Harlem Renaissance photographer James Van Der Zee was born in Lenox in 1886. In the struggle for civil rights, white Americans were influenced by Norman Rockwell’s illustrations on the cover of *Look* magazine that depicted landmark civil rights events. *The Problem We all Live With*, a portrayal of six-year-old Ruby Bridges integrating an all-white school escorted



## Chapter 2: Foundation for Planning *continued*



The Problem We All Live With, Norman Rockwell, 1963. Licensed by Norman Rockwell Licensing Company, Niles, IL. Two Stockbridge girls were models for young Ruby Bridges, and the white dress is at the Norman Rockwell Museum.

by federal marshals, appeared on the cover of *Look* in 1964. Rockwell used two little Stockbridge girls, descendants of early African American residents, as the models for Ruby.

### 2.7 Interpretive Plan

The Interpretive Plan is Appendix 11 of the Management Plan. In fall 2013 and winter 2014 Housatonic Heritage and its partners held a series of interpretive roundtables to develop a region-wide multi-year Interpretive Plan that interweaves interdisciplinary concepts about the land, people, and culture with new initiatives for developing audiences (specifically youth) and using digital media. The Interpretive Plan's goals are: broaden and increase the audience; engage youth; and connect sites, resources, and themes by embracing digital media. A series of twelve action steps follow these goals.



Norman Rockwell's Studio at the Norman Rockwell Museum in Stockbridge, MA.

## Chapter 3: Vision, Mission, Core Programs, and Policies



William Stanley demonstrated the first successful alternating current (AC) transformer in 1886 in Great Barrington, making it possible for electricity to travel across long distances.

### 3.1 Vision

A vision statement describes the effects an organization anticipates in the long term. Housatonic Heritage's vision statement, adopted by the Board of Trustees in November 2009, grew from extensive citizen involvement and input. It describes two future outcomes:

1. Housatonic Heritage imagines a future where inspired actions and a shared vision strengthen the Upper Housatonic Valley's natural, historic, cultural, and community fabric, instilling pride in its resources and reinforcing its identity. The organization recognizes that land and cultural conservation and economic development are interrelated.
2. More and more, the region's improved quality of life and economic vitality is attributed to Housatonic Heritage's work. Individuals and organizations trust its agenda, support its efforts, and commend its collaborations with public, private, and not-for-profit sector partners.

### 3.2 Mission

The mission of Housatonic Heritage is to institute close working relationships among government, local communities, nonprofits, and the private sector by convening groups with common needs and goals, sponsoring pan-regional programs, and serving as a catalyst for action.

On a functional basis, Housatonic Heritage pools resources, centralizes some functions to avoid duplication of services, and communicates effectively among organizations and with the public. It provides a cooperative atmosphere for the initiation of new ideas and collaborations.

The expectation is that with a National Heritage Area spearheading the efforts of an informal or formal federation of organizations, there is a more powerful effect than if individual groups worked on their own. As an umbrella organization, Housatonic Heritage takes a leadership role by looking out for and telling the "big picture" story of the entire 29-town region.

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

In November 2009, the Board of Trustees adopted these goals:

1. Bolster the region's vitality by integrating the stewardship and appreciation of the Upper Housatonic Valley's heritage resources with planning and economic development;
2. Foster residents' and visitors' understanding of the Upper Housatonic Valley and its heritage; and
3. Enrich the experience of the Upper Housatonic Valley as a rewarding place to live, work, and visit.

While Housatonic Heritage shares many of the same goals as regional planning and economic development organizations, it is in touch with broader audiences

and acts as a conduit for information. Housatonic Heritage regularly conveys relevant information from regional planning and economic development organizations to the area's heritage organizations and, likewise, brings heritage concerns back to the planning and economic development organizations, as well as to the Board of Trustees.

### 3.3 The Nine Core Programs

The following core programs have been in practice for nearly a decade because they are truly programmatic successes. All these core programs have been initiated, developed, and managed by Housatonic Heritage in partnership with other organizations. As the foundation of Housatonic Heritage's vision and goals, the management entity directs these programs.

**Diagram 1: Upper Housatonic National Heritage Area Organizational Chart**





## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

**Core Program #1: Heritage Walks** are an annual event on two fall weekends in which Housatonic Heritage provides free, guided walks to historic, cultural, and natural sites in the area. Walks include: tours of historic buildings, industrial sites, cemeteries, and towns; hikes on the Appalachian Trail; walks along old country roads; behind-the-scenes tours at performing arts venues; and strolls through gardens and estates. This well established two-weekend event attracts close to one thousand locals and tourists each year.

**Core Program #2: The History Alliance** enables small history organizations to increase capacity by providing a structure for mutual assistance. With the blueprint for its activities created from the results of surveys and focus groups, the Alliance convenes conferences and workshops, disseminates technical information, and creates the structure for cooperation. A list of the 34 organizations in the History Alliance is in Appendix 6.

The primary mission of the participating organizations is the long-term care and protection of their local history collections which are available to researchers and to the public. These mostly all-volunteer organizations are overwhelmed with challenges like establishing collections policies and maintaining adequate storage for thousands of artifacts made of a variety of materials. The History Alliance brings together volunteers from the small organizations with the professional staff of the larger organizations so they can share expertise and strategies for fundraising, interpretation, preservation, and social media.

**Core Program #3: The African American Heritage Trail** celebrates African American history and life in the Upper Housatonic Valley National Heritage Area, including those who played pivotal roles in key national and international events, such as W.E.B. Du Bois, Elizabeth "Mum Bett" Freeman, the soldiers of the Civil War's Massachusetts 54<sup>th</sup> Infantry, James Weldon Johnson, Rev. Samuel Harrison, and James VanDerZee. Each year the AFAM trail formally dedicates one of its 48 sites with a marker and an event. In March 2012, the library at Bard College at Simon's Rock was formally dedicated as the site where planning for the Du Bois Memorial Park took place in



*Heritage Walk on the Tamarack Trail, Great Mountain Forest in Norfolk, CT.*

1968-69. Among the original sponsors of the 1968 Du Bois Memorial Committee was Stockbridge resident Norman Rockwell who depicted civil rights themes in magazine illustrations. Activities, signage, publications, and exhibits will continue to enrich public experiences at the sites on the trail.

The AFAM Trail is a well-established program, having produced dozens of events and publications, including the foundational book *African American Heritage in the Upper Housatonic Valley*, and numerous informative brochures. The AFAM Trail has also created W.E.B. Du Bois curricula adhering to U.S. National Standards. One of its projects, the W.E.B. Du Bois National Historic Site, now also a program of Housatonic Heritage, is on its way to becoming its own 501 (c) 3 nonprofit organization.

**Core Program #4: The Iron Heritage Trail** is to celebrate the nationally significant 1735-1923 regional iron industry by preserving important sites for public use, providing informational materials, and conducting educational activities in conjunction with several local partners. With the Friends of Beckley Furnace, the Iron Heritage trail has created a well-visited site and has developed several publications and educational tools including *Visions of Iron*, a film and a brochure that identifies the 59 iron sites throughout the heritage area.

The Iron Heritage Trail has developed strong collaborative relationships with businesses, government

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

**Table 1: Current Funding Sources for Housatonic Heritage Core Programs**

Core Program	Current Funding Sources
Core Program #1: Heritage Walks	Berkshire Bank Foundation Legacy Banks Foundation Salisbury Bank & Trust Becton Dickinson & Co. Interlaken Inn
Core Program #2: The History Alliance	CT League of History Organizations Berkshire Historical Society Stockbridge Historical Society Great Barrington Historical Commission Great Barrington Historical Society Hancock Shaker Village Red Lion Inn
Core Program #3: The African American Heritage Trail	Friends of Du Bois Homesite 1772 Foundation UMass Amherst National Endowment for the Arts
Core Program #6: Regional Trails: Bike, Hike, and Paddle	Cornwall Foundation Connecticut Dept. of Energy & Environmental Protection Berkshire Regional Planning Commission Northwestern CT Council of Governments Northwest Conservation District
Core Program #7: The Arts Heritage Project	Special Funding Not Yet Sought
Core Program #8: The Upper Housatonic Valley Experience	Berkshire Chamber of Commerce Berkshire Regional Employment Board Mass. College of Liberal Arts Berkshire Community College
Core Program #9: The Heritage Partnership Grant Program	All grants are required to provide a minimum 1:1 matching. Consult the Housatonic Heritage 'Annual Reports' for specific information on the source of those matching funds.

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

agencies, and non-profit organizations since the small dedicated group began to work together in 1996. In 2011, volunteers clocked more than 4,000 hours of work for the Beckley Furnace property and at the related sites along the Iron Heritage Trail. Due to the commitment of volunteers and rent received, the Iron Heritage Trail is essentially self-sustaining.

**Core Program # 5: The Paper Heritage Trail** exists to preserve, interpret, and share the history of fine and specialty papermaking in the region and the industry's connection to the economic vitality, culture, and built environment of the region, and the contemporary challenges of the present paper businesses. The Paper Trail collaborates in the production of exhibitions, classes, and workshops, a Paper Trail by Rail and other events, this program has sought to raise awareness of past and present paper making here.

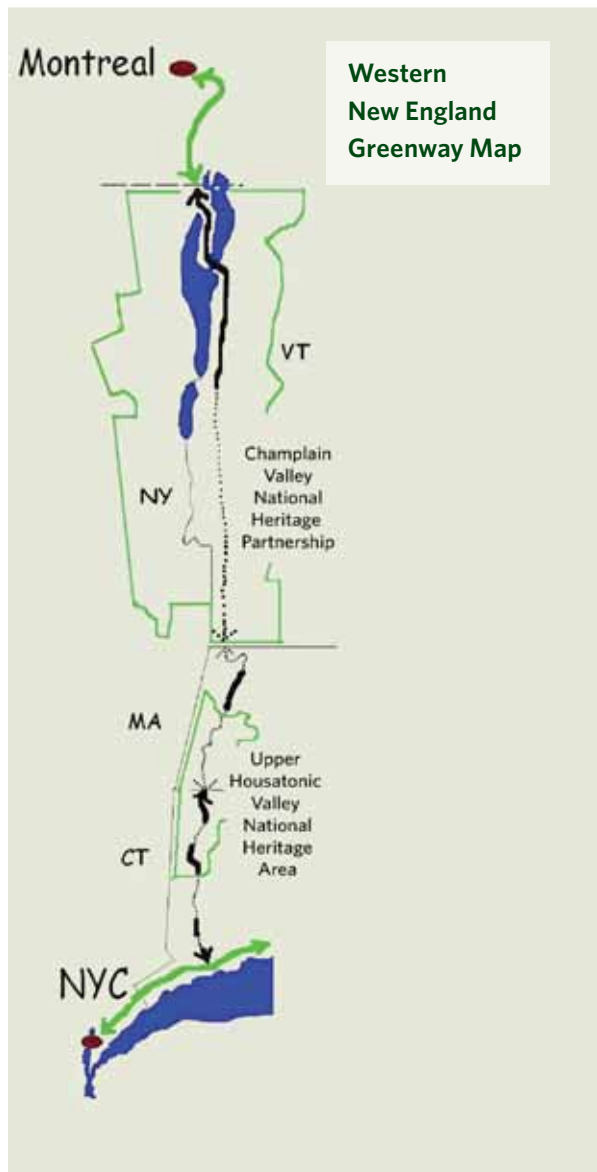
**Core Program #6:** The purpose of the **Regional Trails: Bike, Hike, and Paddle** program is to allow exploration of our varied and changing landscape, both in and along the river, and to provide the opportunity for education. Five miles of steep trails take hikers to the top of Alexander Mountain (2,239 feet) in Mount Washington State Forest where they enjoy a view of the Taconic Mountains before heading back down. From the top of Haystack Mountain (1716 feet) in Norfolk, CT, hikers can see Long Island Sound, the Berkshires, and peaks in New York State. In 2009, the Great Barrington River Walk was designated a National Recreation Trail, joining it to the 12,000 mile National Trail System. The trails are a tourism draw that is low impact, reduces motorized vehicles, while it lowers the carbon footprint, thus preserving natural resources

As the number of trails increases, special attention needs to be paid to ongoing maintenance and interpretation that will lead visitors to understand the powerful affects people have had, and continue to have, on the land as well as the value of stewardship.

Since 2006, organizations in Massachusetts and Connecticut (with the assistance of Housatonic Heritage) have been hard at work building a regional network of multi-use recreational paths. Results include the goal to create a coterminous, multi-state



Lakeville, CT, cyclists.





## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

route, called the Western New England Greenway (WNEG), from New York City to Montreal. The potential for linking to other trails to create loop cycle touring is extensive, including: a route using the Farmington-Connecticut River and Cross Vermont Greenway corridor to connect New Haven, CT, and Burlington, VT; links between the Erie Canal route in NY State, the Mountain Division across Maine and New Hampshire and the Lamoille Valley Trail in Vermont to link Burlington with Portland, Maine; and finally, via Danbury, CT, linking to the North and South County Trails in Westchester County, NY, and then to Manhattan. Leadership for river access is provided by the recognized regional leader, Housatonic Valley Association, an organization that is a key partner with Housatonic Heritage.

Housatonic Heritage is concerned about the ongoing support for **the maintenance** of this vast resource. Trails must be safe, protective of habitats, and in good shape for travelers. This time-consuming and expensive job requires constant vigilance and a continuous flow of funding. The maintenance plan devised by the organization Great Barrington Trails and Greenways is a model for Housatonic Heritage. The Appalachian Mountain Club trained “Greenagers,” teenage volunteers and paid staff, to perform trail maintenance. Now, local Greenagers are passing their skills to the next generation through paid jobs as trainers of new volunteer recruits. The importance of collaboration and mentoring cannot be overemphasized. For young people to become stewards, they must receive the proper training, mentoring, and have access to the right resources.

**Core Program #7: The Arts Heritage Project** has initiated its task of interpreting the region’s history as a cultural center by exploring and educating the public about how this region has attracted writers, musicians, and artists and formed organizations that have flourished here. The exploration will begin with a survey of current trends. In 2012 the Arts heritage Project launched a writer-in-residence program named “Call me Melville” that links Melville’s home, now the Arrowhead historic site, and the Pittsfield High School through a writer-in-residence program.



*Upper Housatonic Valley Experience teachers at Beckley Furnace in Canaan, CT.*

**Core Program #8: The Upper Housatonic Valley Experience**, offered in conjunction with Massachusetts College of Liberal Arts, Berkshire Community College, and the Berkshire Chamber of Commerce, has been providing area teachers with a week-long, intensive, three-credit summer course on local historic and natural heritage for ten years. To date, more than 150 teachers have completed the course. The template is a team-taught, three-credit intensive graduate course that features visits to area natural and historic heritage sites, as well as curriculum design and development oversight. It is a stable program that has a waiting list, and while there may be details that change or sites that are added or removed, the template will remain.

**Core Program #9: The Heritage Partnership Grant Program** awards matching funds (\$5,000 maximum) to projects proposed by area non-profits and governmental entities that support and further the heritage area’s mission. Each year, the Board establishes a special focus by selecting an area that has been neglected or requires seed money as a boost to get started.

In 2011, eighteen organizations were awarded a total of \$73,000 for recreational and interpretive trails, the focus of that year. The grants were matched by an additional \$290,000 from other sources. The funded projects ranged from interpretive panels at a historic quarry walk in Becket, MA, to interpretive signage at the Kent Iron Works in Kent, CT. Six

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*



*The Servant of Two Masters, Shakespeare & Company 2006*

organizations collaborated to develop the eighteenth century trail project, called the Historic Berkshires, which interprets the social conditions or the era at six significant historic sites. A second collaborative example is the “Herman Melville in the Berkshires Trail,” which is a season-long collaboration of heritage institutions and municipalities that culminated in a festival in downtown Pittsfield, trail markers at six sites, and an interpretive brochure.

### 3.4 The Housatonic Heritage “Toolbox”

To accomplish these core programs, Housatonic Heritage has developed “tools” for gathering and disseminating information, convening organizations that share missions, determining regional needs, and developing and marketing programs. In its decade of existence, Housatonic Heritage has found that collaboration and free exchange of resources and ideas between organizations makes efficient use of limited resources which is essential in this largely rural region. Moreover, the interchange between different ways of thinking is mutually productive and beneficial.

In that spirit, the following “tools” or services have been employed by staff to identify and address issues of concern within the heritage area. The “Toolbox” is not static, and, in fact, with new technologies and changing economic landscapes, the tools must

be flexible. But these basic tools help Housatonic Heritage to address new projects with equanimity and identify its roles to its partners and others.

- **Focus groups:** Learn what is needed in a given project area by convening small groups of interested people.
- **Advisor Teams:** Convene ad hoc or standing committees of regional partner representatives to sift through focus group material, conduct research on applicable policies of government and private organizations and other data in order to recommend a course of action reflective of the mission of Housatonic Heritage.
- **Conventions (“convenings”):** Organize events to connect small and large organizations for purposes of communication, learning, strategy setting, and problem solving. Foster civic dialogue surrounding controversial issues.
- **Publications and Educational Multimedia:** Facilitate the production, with partners, of print (from brochures to books), multi-media, and web materials; conduct research and inventories that document the region’s heritage, and present it in attractive and friendly formats.
- **Cross-organization Residencies:** Support

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

site specific “place making” activities with our heritage organizations and schools, bringing together groups who might not normally work together, and engaging the next generation.

- **Curricula and Interpretive Programming:** Build on the ten-year old Housatonic Heritage *Upper Housatonic Valley Experience* teacher education program. Develop the program into specific heritage content areas for schools and general public.
- **Leveraging financial and staff resources** by attracting partners who contribute time, expertise, and funding, making projects and programs more comprehensive and reaching broader audiences than any one organization could do on its own.
- **Conduit Activity:** Solicit advice and resources from larger organizations with a broader reach that exist outside the heritage area, such as state and federal agencies, the National Trust for Historic Preservation which owns Chesterwood, Historic New England, Inc. which operates Merwin House in Stockbridge, and other heritage areas. Inform heritage area organizations of funding opportunities beyond the region.
- **Grants:** Each year Housatonic Heritage awards \$40,000 to \$70,000 in grants to local organizations. Grants expand capacity for small organizations, and the program encourages cooperative relationships within the heritage area. By determining a specific focus for the applications, grants enable Housatonic Heritage to work with partners to accomplish region-wide goals. In 2011, a total of 18 grants distributed \$60,000 for recreational and interpretive trails. Another \$290,000 was pledged from other sources for the projects.

In carrying out the nine core programs and with the operation of the “Toolbox,” the expectation is that Housatonic Heritage and its partners leverage resources to maximize output. A decade of evidence proves that strong support of each other and resource sharing yields powerful results.

### TWO EXAMPLES OF RESPONDING TO COMMUNITY PRIORITIES



#### African American Trail Advisory Council

In 2004 Housatonic Heritage established the African American Advisory Council and tasked it to conserve resources related to W.E.B. Du Bois, Elizabeth ‘Mum Bett’ Freeman, Samuel Harrison, Agrippa Hull, and other significant African Americans in the region. The resulting program—The African American Heritage Trail—accomplished: the publication of the definitive reference book for the region titled *African American Heritage in the Upper Housatonic Valley*; the rehabilitation and preservation of the Housatonic riverbanks in Great Barrington, now called the Great Barrington River Walk; the creation of the W.E.B. Du Bois River Garden Park; the creation of public access and interpretation at the Du Bois Homesite and more. This work continues to date.

#### Guide to CT Revolutionary War Sites

A second example is the publication of a touring guide to Revolutionary War sites in Connecticut. Housatonic Heritage assembled a team of scholars and local historians who worked together to develop the online touring guide to dozens of historic sites throughout Connecticut. The resulting partnership included dozens of history organizations, Central CT State University (provided experience copy writing), CT League of History Organizations (verifying historical facts), the Washington-Rochambeau National Historic Trail and a for-profit bicycle touring company. Funding sources varied, with grants from the CT Humanities Council, Central CT State University and private contributions.





*Heritage Walk at the site of the Amesville Iron Works in Falls Village, CT.*

### 3.5 Comprehensive Management Policies

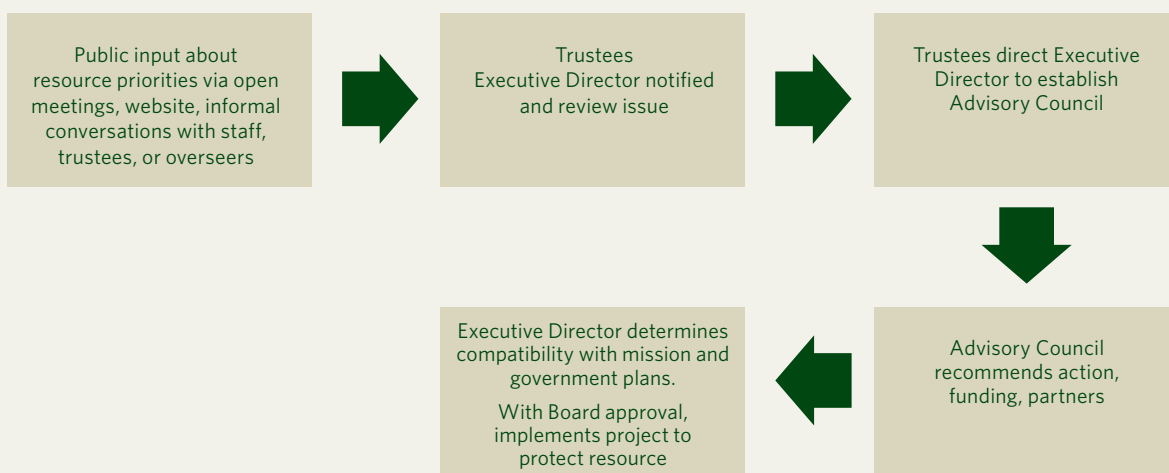
Based on the foundation of the vision, mission, nine core programs, and “toolbox,” these policies and strategies have been identified to establish goals for the next five years and to create a plan to implement those goals. The bedrock of Housatonic Heritage’s vision, mission, and goals is the assumption that its actions are reflective of the priorities of the region. Thus, Housatonic Heritage’s management policies and strategies (listed below) are the processes it uses to learn about the community’s priorities and concerns and to determine how to address them. The Implementation Plan will list recommendations for strengthening these successful policies.

In addition to responding to the community’s needs, Housatonic Heritage also leads the community in preserving its heritage. When the Trustees recognize that specific heritage assets or resources are unprotected, under-utilized, or have no grassroots efforts speaking for their preservation, then the Trustees will convene an advisory group which it directs to recommend courses of action.

#### 3.5.1 Policies for Learning Community Priorities

A regular flow of information and ideas to Housatonic Heritage staff and trustees about conservation, preservation, and heritage issues is achieved through these

**Diagram 2: Process to Respond to Community Priorities**



## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*



*Heritage Walk in Arthur Warton Swann State Forest in Monterey, MA. Guide identifies evidence of Revolutionary War Trail and charcoal industry.*

management policies which are easily accessed by the public and stakeholders. There is an open-door policy; all ideas are welcome and given serious consideration.

- 1. Quarterly Public Meetings.** Quarterly, Housatonic Heritage holds open public meetings during which citizens are encouraged to bring up and discuss issues related to conservation, natural resources, and historic heritage and to make suggestions for action. Typically, the trustees identify a cultural or natural resource theme that deserves exploration (a center of blues music in the region in the 1940s is one example) and call a public meeting. Trustees invite a broad cross-section of interested parties to exchange ideas. With diverse points of view and an open forum, unexpected ideas and results are generated and sent to the Board of Trustees for official action.
- 2. Board of Trustees.** The fourteen-member Board of Trustees is comprised of policy makers from conservation, arts, and heritage associations of the Upper Housatonic Valley. Current board members include: director of the Housatonic Valley Association; the

executive director of the Mahawaie Theatre; and the co-chair of the Great Barrington Trails and Greenways organization. The Trustees have an “ear to the ground” regarding resources that need protection, attention, or can be readied for recreation. The Board meets six times per year.

- 3. Council of Overseers.** The seventeen-member Council of Overseers meets twice annually to make specific recommendations to the Board of Trustees regarding conservation, preservation, and management of the heritage area. The Overseers keep Housatonic Heritage abreast of relevant issues. The Council is a diverse entity that is comprised of senior managers and policy makers in the fields of the arts, culture, history, natural resources, business, nonprofit funding and governance, education, and government. Among the current council members are: the executive director of the Berkshire Regional Planning Council (he has assigned a regional planner to the committee on regional trails); the executive director of the Northwestern Council of Governments (who

## Chapter 3: Vision, Mission, Core Programs, and Policies *continued*

heads the trail committee for Connecticut); director of Norman Rockwell Museum; director of the Berkshire Taconic Community Foundation; dean of academic affairs at Massachusetts College of Liberal Arts; president and CEO of the Berkshire Visitors Bureau; chairman of board of Salisbury Association (land conservation organization); and senior vice president for Salisbury Bank. Members who rotate off the Overseers will be replaced by community leaders and stakeholders of similar stature and ability.

See Chapter 5 for strategies to ensure the composition of the Overseers includes planning organizations, governmental units (both state and local), heritage institutions (culture, history, natural resources) and senior or policy-level personnel of land trusts, foundations, and historic commissions.

4. **Housatonic Heritage website:** Currently, the website serves as a dissemination function. Part of the Implementation Plan is to make Housatonic Heritage's online presence more interactive and participatory.
5. **Service on Boards of Partner Organizations.** The Housatonic Heritage executive director gathers information about issues pertinent to conservation and preservation by serving on several boards of directors, including the Berkshire Visitors Bureau, Western Connecticut Convention & Visitors Bureau, and the Connecticut Region 1 Partners in Education. Members of the Board of Trustees and Council of Overseers are equally community-minded and connected individuals who serve on other boards and volunteer in the community.
6. **Annual Idea Exchanges.** Plans for an annual idea exchange in the areas of the arts, history,

and natural resources will be discussed in Chapter 5. The goal is to breed collaboration among similarly tasked organizations and to ensure that these organizations do not run parallel programs.

### 3.5.2 Policies for Decision-Making

When ideas, concerns, or possible initiatives are generated through the above-mentioned strategies, they are funneled to the executive director and Board of Trustees for inclusion on the agenda at an upcoming meeting. The Board will then decide what Housatonic Heritage can and cannot do under the following policies:

1. With projects needing further scrutiny, the Board will assemble an **advisory council** to gather input, including that of interested parties not part of the initial conversation. The advisory council is tasked with determining the policies and plans of local and state governments that have jurisdiction on that issue within the region.
2. At each stage Housatonic Heritage and its advisors cross-check proposed initiatives to ensure compatibility with existing plans and policies of whatever jurisdiction the impact might be felt, including **local, regional, and state governments** and such as the Massachusetts Department of Conservation and Recreation, the Fish and Wildlife Service, as well as the purview of nonprofit organizations.
3. The Advisory Council returns a **recommendation to the Board**, and action is taken.

These strategies and policies were used as the foundation for the development of the Implementation Plan as outlined in Chapter 5.



## Chapter 4: Development of the Management Plan



*Climbing Monument Mountain, Great Barrington, MA*

The development of the Management Plan took into consideration: 1) public opinions through public participation; 2) existing state, county, and local plans; 3) the policies of Housatonic Heritage; and 4) the actions that governments, private organizations, and individuals have agreed to take to protect the natural, historical, and cultural resources.

### 4.1 Public Participation and Scoping

The term “scoping” defines a process by which stakeholders and the public bring forth their interests in an open forum. Stakeholders include members of the public, staff members of interested organizations and agencies, and representatives of agencies with jurisdiction in the heritage area, either because of legal responsibility or expertise.

Between 2007 and March 2010, a total of 25 well-publicized public meetings were held around the region to:

1. inform interested parties and the public about the Management Plan;
2. identify concerns regarding proposed activities and their potential impacts;

3. determine which concerns need further analysis; and
4. gather information to develop management scenarios.

The consultant team and Housatonic Heritage staff interviewed stakeholders to glean issues of concern not raised in public meetings. In addition, the Housatonic Heritage Advisory Board and Board of Trustees held monthly meetings and took biannual retreats. The dates and locations of the public scoping meetings, Advisory Board meetings and the Board of Trustees meeting to discuss the management plan are listed in Appendix 7.

### 4.2 Summary of Issues Raised in Scoping

Between December 2009 and March 2010, three additional public meetings were held to discuss potential impacts that the management scenarios and actions might have on the region. The public and stakeholders identified issues of preservation of resources, sensitive economic development, support for local businesses, retention of regional character, and potential environmental impact. A summary of the concerns raised appears in Appendix 8.

## Chapter 4: Development of the Management Plan

Many other goals were suggested during public sessions. These include improving the local economy, managing growth, and renewing a sense of public “ownership” of the long-polluted Housatonic River. The Housatonic Heritage Trustees have decided to remain supportive and informed regarding these issues but to offer no direct involvement, reasoning that other organizations in the region are better suited to address these issues.

The issues raised were not new ones for Housatonic Heritage. Since its inception in 2000, inquiries about Housatonic Heritage activities have arisen that implicitly reflect local stakeholder concerns about:

- Preserving critical historic, cultural, and natural resources;
- Encouraging sensitive economic development; and
- Reinforcing the vitality of the region’s communities.

These issues have been addressed through partnerships with Housatonic Heritage’s environmental and natural resource preservation organizations. The Housatonic Heritage Board of Trustees and the boards of environmental/natural resource preservation organizations meet periodically to discuss how each of the issues can best be addressed.

### 4.3 Management Scenarios

During the planning process, ideas put forth by the public, stakeholders, partners, and the Board of Trustees coalesced into three distinct management scenarios, or futures, for Housatonic Heritage. The three scenarios were these:

- Scenario 1: Continue the Core Functions and Programs
- Scenario 2: Become a Catalyst for Sharing Our Heritage
- Scenario 3: Promote Regional Economic Vitality and Address Regional Heritage Issues

All three scenarios are consistent with Housatonic Heritage’s mission as stated in its original documents and in this report. Moreover, these scenarios all

express a preference for partnerships, programs that leverage resources, and for outcomes that improve capacity. In all scenarios, Housatonic Heritage seeks projects that demonstrate new and improved approaches and provide opportunities for replication by regional partners and resource stewards.

#### **4.3.1 Scenario 1: Continue the Nine Core Programs**

Under this scenario, Housatonic Heritage would continue its nine core programs but take on no new initiatives. The core functions are: Heritage Walks, History Alliance, African American Heritage Trail, Iron Heritage Trail, Paper Heritage Trail, Recreational Trails, Arts Heritage Trail, Upper Housatonic Valley Experience, and the Partnership Grant Program. Organizations and agencies would continue to partner with Housatonic Heritage and provide in-kind donations and other support at its current level. While Housatonic Heritage would continue to advance strategies about how it could be most effective, it would still encourage ideas to be generated by other organizations. Housatonic Heritage would then decide whether to partner or allocate a small amount of funds to advance new initiatives. In addition, Housatonic Heritage would continue to be a supporting partner in projects and programs sponsored by other organizations, such as festivals and road races.

#### **4.3.2 Scenario 2: Catalyst for Sharing Our Heritage:**

The salient feature of Scenario 2 is the strong role for Housatonic Heritage as a catalyst—a motivator, a collaborator, a convener of people—and as an organization that leverages resources of organizations to maximize the power of partnerships. In the heritage sector, and beyond, Housatonic Heritage would truly be a catalyst for the development of opportunities for people to learn about and enjoy the region’s heritage. It would emphasize heritage experiences, product development (such as brochures and educational materials), outreach and curriculum materials, all accomplished through strong partnerships and by encouraging resource-sharing among organizations.

## Chapter 4: Development of the Management Plan *continued*

Scenario 2 includes two priorities:

1. serving as a clearinghouse, facilitator, and coordinator of resources to help local heritage organizations address new or challenging issues such as preservation of outbuildings and research on American Indian presence in the area; and
2. leveraging the resources of other organizations to make a greater impact on heritage education.

Scenario 2 represents an approach to achieving Housatonic Heritage's goals that places major emphasis on creating heritage experiences as well as on and sharing and protecting resources, with secondary emphasis directed towards fostering economic development, addressing regional issues, and increasing the economic capacity of partners and other heritage stewards.

Housatonic Heritage would remain a non-profit, partner-oriented organization with the current structure for governance, staffing, and partnerships, consisting of the Board of Trustees, an executive director and staff, theme and project committees, and a Council of Overseers. However, over time:

- The Board would evolve to include a greater proportion of appointees who offer experience in interpretation and creating heritage-oriented visitor attractions and programming;
- The theme and activity committees would be supplemented as necessary to reflect the emphasis on sharing the Upper Housatonic Valley's heritage;
- Programmatic emphasis would be accompanied by a shift in how Housatonic Heritage allocates its human and financial resources, with approximately 60 percent of resources devoted to creating and enhancing heritage experiences and the remainder devoted to other consistent activities.
- Core programs and programs (as noted above) would be expanded and enhanced.



*Great Mountain Forest Tamarack Trail, Litchfield County, Connecticut.*

### **4.3.3 Scenario 3: Promote Regional Economic Vitality and Address Regional Heritage Issues**

Scenario 3 emphasizes tourism and economic development by addressing regional issues and increasing the capacity of partners and other heritage stewards. The focus is on creating jobs and economic activity geared towards areas that are not under protection as cultural, environmental, and historic resources. Housatonic Heritage would remain a non-profit organization with essentially the same structure for governance, staffing, and partnerships, consisting of the Board of Trustees, executive director and staff, theme and project committees, and the Council of Overseers. However, over time:

- The Board would evolve to include a greater proportion of appointees who are offering experience in tourism and economic development and representing regional organizations;
- The current theme and activity committees would be supplemented as necessary to reflect the emphasis on fostering economic vitality
- Programmatic emphasis would be accompanied by a shift in how Housatonic Heritage



## Chapter 4: Development of the Management Plan *continued*



*The Truman Wheeler House was saved by the Great Barrington (MA) Historical Society just days before its scheduled demolition. Now on the National Register of Historic Places, the house will serve as the Historical Society's education center.*

allocates its human and financial resources, with approximately 60 percent of resources devoted to heritage-positive economic development and the remainder devoted to other nonprofit activities.

With this approach, Housatonic Heritage assumes a proactive role; it is an organization that advocates, marshals the resources, and makes change. It provides the education, encouragement, clout, and resources to make other organizations become increasingly effective and advance the economy of the region. Under Scenario 3, Housatonic Heritage might act on these potential new strategic initiatives such as: measure economic impact of heritage activities to use as evidence to promote economic development that strengthens infrastructure for natural and heritage resource; address issues that transcend boundaries like invasive species, trail systems, rail lines and signage; and build capacity among the region's resource steward by offering technical assistance and serving as a non-profit "incubator" to help launch organizations.

### **4.3.4 Preferred Scenario is Number 2: Catalyst for Sharing Our Heritage**

Housatonic Heritage's current work program—which constitutes Scenario 1 and serves as the baseline for Scenarios 2 and 3—and the many suggestions for new avenues received a thorough review and in-depth discussion by partners, the public, and the Board of Trustees. Based on their knowledge of the history, strengths, and successes of the organization, the Trustees have clearly expressed a preference for Scenario 2: Catalyst for Sharing Our Heritage because it:

- offers the best means to continue and build upon Housatonic Heritage's existing work program and past accomplishments;
- entails focusing on existing resources, which offers the best means to create long-term impact in the Upper Housatonic Valley;
- focuses on the interpretation of heritage area resources and sharing those resources with residents and visitors, which offer an indirect

## Chapter 4: Development of the Management Plan *continued*

means to advance the objectives inherent in pursuing Scenario 3.

- leverages Housatonic Heritage area resources to enable more to be accomplished by gathering organizations together, pooling resources and energy toward the goal of public appreciation and education.

Over the course of the decade or more, there has been much interest in Housatonic Heritage serving as an economic engine in the region. The Trustees and Council of Overseers have maintained that this is not realistic nor should it be the goal of the organization. They reason that economic development is dependent upon quality of life which draws people to an area to live. If Housatonic Heritage focuses its efforts on enhancing quality of life through education and experiences in heritage, culture, and the environment, then economic development will have a desirable base from which to grow. Housatonic Heritage will exploit its unique opportunity to be a convener, a coordinator, and collaborator of resources for the benefit of the region.

### 4.4 Relationship to State, County, and Local Plans

Housatonic Heritage devised the path to become a Catalyst for Sharing Our Heritage through the development of the Implementation Plan. As part of that process, Housatonic Heritage has taken into consideration existing state, county, and local planning

efforts. In 2007 Housatonic Heritage initiated a review of existing state, county, and local plans that refer to the following five heritage area themes:

- Conservation of scenic and natural resources
- Development of cultural events & institutions
- Preservation of historic assets
- Creation of greenways, biking and hiking trails, and walkways
- Transportation planning

The review was conducted by the Berkshire Regional Planning Commission (BRPC) and Housatonic Valley Association (HVA), in conjunction with Housatonic Heritage. The title of the 95-page report is **The Upper Housatonic Valley National Heritage Area: Review And Summary Of Municipal And Regional Planning Documents Relating To Heritage Area Mission**, completed in December 2007.

Three types of plans were researched for this assessment: formally developed municipal plans; current municipally led planning initiatives; and regional plans. For Massachusetts municipalities, municipal plans consisted of Master Plans, Open Space and Recreation Plans, Community Development Plans, Commonwealth Capital Applications, and Community Development Strategies. For Connecticut municipalities, municipal plans consisted of Plans of Conservation and Development, Natural Resource Inventories,



#### Plans Since 2007

Since Housatonic Heritage's 2007 review of existing state, county, and local plans, the newest and broadest regional plan is the 2012 draft of "Sustainable Berkshires," a HUD-funded county-wide multi-year planning effort. Housatonic Heritage was a key partner in three areas of

the report: Historic Preservation, Conservation, and Recreation. Through this report and through follow-up activities, the heritage area will receive assistance in protecting resources.

According to the Housatonic Valley Association and the Northwest (CT) Conservation

District, there has been no regional planning effort in Connecticut since 2007 that is related to the broad interests of Housatonic Heritage.

The Housatonic Heritage report of 2007 was the last study to make a comprehensive review of all state and municipal plans.

## Chapter 4: Development of the Management Plan *continued*

Historical and Architectural Resource Surveys, the Scenic Corridor Management Plan, and the Housatonic River Management Plan.

### 4.4.1 Municipal Plans

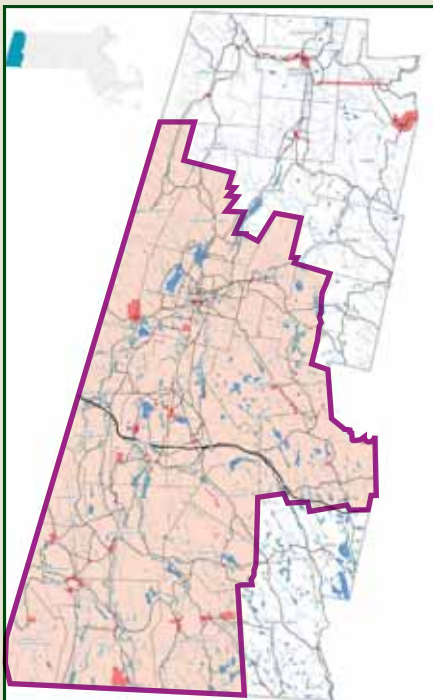
Overall, although **municipal plans** varied widely from each other regarding the level of specificity, they showed strong consistency with heritage area themes. Two themes, Conservation of Scenic and Natural Resources (particularly related to water and wetland protection, open space preservation, farm and farmland preservation, ridgeline protection, and local scenic road protection) and Greenways, Trails and Walkways (particularly related to a specific community trail, walkway, or establishing linkages within or to other settled areas in the community) were most featured in municipal plans. Some aspect of historic preservation was also featured in municipal plans. Except for items related to developing bikeways, the Transportation and Developing Cultural Events and Institution thematic areas were emphasized less in

municipal plans than the other three themes. All but one municipality had a municipal planning document related to the heritage area themes.

From the analysis of municipal planning documents, potential heritage area opportunities were identified. These include forming strong partnerships with municipalities to enhance existing volunteer planning efforts, promoting inter-municipal planning coordination, assisting communities to provide a greater focus and specificity to broadly defined municipal planning items, assisting in the advancement of specified items that were mentioned in numerous municipalities, and taking the lead to help develop cultural events and institutions.

The following Massachusetts municipal plans were reviewed:

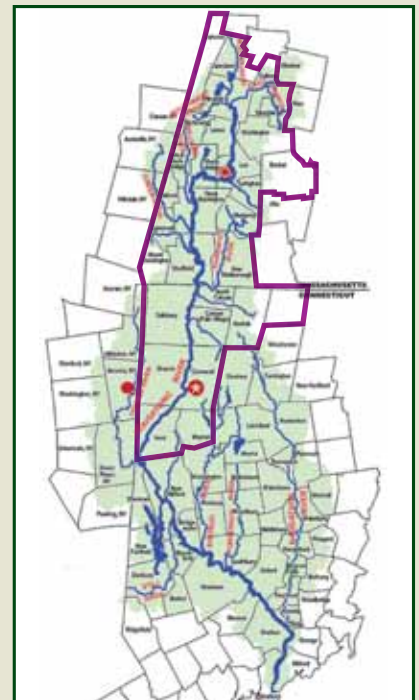
1. Master Plans
2. Open Space and Recreation Plans
3. Community Development Plans



Berkshire (County) Regional Planning Commission region with Housatonic Heritage overlay.



Northwest CT Conservation District with Housatonic Heritage overlay.



Housatonic Valley Association region with Housatonic Heritage outlined.

— Represents Heritage Area



## Chapter 4: Development of the Management Plan *continued*



*Trees at sunset in the South Taconic Range on the border of Massachusetts and Connecticut.*

4. The Town's most recent Commonwealth Capital Application
5. Community Development Strategies
6. Mt. Greylock Scenic Byway Corridor Management Plan, 2000 (Town of Lanesborough)
7. Lee Downtown Strategic Review, 2007 (Town of Lee)
8. Community Preservation Plan, 2007 (Town of Lenox)

The following municipal plans were reviewed for municipalities in Connecticut:

1. Plans of Conservation and Development
2. Natural Resource Inventories
3. Historical and Architectural Resource Surveys
4. Scenic Corridor Management Plan
5. Housatonic River Management Plan
6. Historic Sites Map (Town of Cornwall)
7. Greenways Map (Town of North Canaan)
8. Character Study and Open Space Plan (Town of Kent)

### **4.4.2 Regional Plans**

Thirty four **regional plans** were reviewed. Regional plans were from state agencies, regional planning agencies, councils of government, watershed organizations and other non-profit organizations. Overall, regional documents showed a strong consistency with heritage area themes and municipal plans. While many plans were reviewed, there were relatively few that dealt significantly with all or most of the heritage area themes across a relatively large geographic area. The themes of Protection of Aesthetic Landscapes, Water and Wetland Resources, as well as those related to outdoor recreation opportunities, were most frequently featured in regional plans. Relatively few regional documents were identified dealing with the historic preservation, promotion of cultural events, or institutions themes and other transportation issues.

From the analysis of regional planning documents, potential heritage area opportunities were identified. These included using the few regional documents that spoke to multiple heritage areas themes across a broad geographic as examples for the Heritage Area Management Plan, assisting in updating certain regional

## Chapter 4: Development of the Management Plan *continued*

plans or specified items within those plans (especially items relating to implementation), using the heightened attention already given to water resources and open space preservation as bases to expand into other heritage area themes, using ongoing regional planning efforts as ways to access potential funding sources, improving the linkage between regional and municipal planning efforts related to outdoor recreational opportunities and building a greater regional presence related to historic preservation issues, promotion of tourism, and the development of cultural events and institutions.

Items that were selected for this report focused primarily on actions that public entities have defined that would have a direct impact on one of the five above identified themes. To qualify for this report, the actions must have received some type of approval by the Town or City. Draft plans were considered if they were significantly completed.

Actions identified by a wide range of private non-profit cultural institutions or non-profit advocacy groups were generally not included in this report. However a plan, funded or endorsed by a Town to serve the needs of those organizations directly, was included.

The following plans were reviewed for municipalities in Massachusetts:

1. Final Round 1 Restoration Plan and Supplement Environmental Assessment, General Electric / Housatonic River, Natural Resource Restoration, Massachusetts Housatonic River Watershed, Restoration Program, 2007
2. The Housatonic River Restoration Plan—Plan Update, 2004
3. The Housatonic River Restoration Plan by the People of Berkshire County December, 1999
4. A Regional Plan for the Berkshires, 2000
5. East Branch Housatonic Watershed Assessment Project, 2005
6. Housatonic River 5-Year Watershed Action Plan, 2003
7. Assessment of Land Use Activities and Nonpoint Source Pollution in the Housatonic River Watershed, 1999



*Linwood House on the grounds of the Norman Rockwell Museum*

8. Resource Management Plan for the Kampoosa Bog Drainage Basin ACEC, 1999
9. The Berkshire Blueprint A Shared Economic Vision and Plan for Action, 2006
10. Massachusetts State Historic Preservation Plan, 2006-2010
11. Great Estates Preservation Options, 2000
12. Commonwealth Connections: A Greenway Vision for Massachusetts, 1999
13. Statewide Comprehensive Outdoor Recreation Plan, 2000
14. Massachusetts Appalachian Trail Management Plan, 1993
15. Draft 2007 Massachusetts Bicycle Transportation Plan, 2007
16. Jacob's Ladder Trail Tourism Marketing Strategy, 2004
17. Berkshire Bicycling & Walking Plan December, 2003
18. Mt. Greylock Scenic Byway Corridor Management Plan, 2000
19. Jacob's Ladder Trail Scenic Byway Corridor Management Plan, 1994

While there were other state or regional plans which included some aspect of heritage area themes, it was beyond the scope of this project to review all of those items exhaustively. As a result, they were only briefly mentioned.

## Chapter 4: Development of the Management Plan *continued*



*Hancock Shaker  
Village, Hancock, MA.*

Those include:

1. Western Massachusetts Scenic Byway Promotional Campaign, 2008
2. Historic Preservation Initiative, 2008
3. Shoreline Survey Reports and Action Plans
4. Housatonic Watershed 2002 Water Quality Assessment Report, 2007
5. Stormwater Assessment in the Hoosic and Housatonic Watersheds, 2000
6. BioMap :Guiding Land Conservation for Biodiversity in Massachusetts

Review and Summary of Municipal and Regional Planning Documents

1. Comprehensive Wildlife Conservation Strategy, 2006
2. Forestry Plans
3. Historic Surveys
4. Berkshire Regional Transportation Plan 2007

The following plans were reviewed for municipalities in Connecticut:

1. Conservation and Development Policies Plan for Connecticut, 2006
2. Route 7 Scenic Corridor Management Plan, 1998

3. Northwestern Connecticut—Regional Plan of Development, 1989
4. The Green Plan, 2007
5. Officially Designated Connecticut Greenways
6. Housatonic River Management Plan, 2006
7. Towards Sustainable Development: An Economic Strategy for the Northwestern Connecticut Region, 1993
8. Statewide Comprehensive Outdoor Recreation Plan, 2005
9. Appalachian Trail Management Plan, CT
10. Highlands Conservation Act—CT Regional Study, 2002
11. Litchfield Hills Greenprint Project, 2006
12. Statewide Bicycle and Pedestrian Transportation Plan, 1989
13. Connecticut Recreational Trail Plan, 2004

Other Connecticut Regional Initiatives:

1. Connecticut Bicycle Map, 2002
2. Connecticut Farm Map, 2007
3. Official State Tourism Map, State of Connecticut
4. Northwestern Connecticut Regional Planning Collaborative, formed in 2007



## Chapter 4: Development of the Management Plan *continued*

The most relevant portions of the planning documents noted above—as they directly relate to the agreed actions of Housatonic Heritage partners—were excerpted and used below.

### 4.5 Housatonic Heritage Partners and Agreed Actions

In December 2011 and January 2012, Housatonic Heritage staff interviewed leaders of key strategic partners and programming partner organizations to ensure that the **Housatonic Heritage Management Plan dovetailed with the current goals and plans of its partners and to define agreed upon actions.** This section describes the partners and agreed upon actions.

In the UHVNHA, several regional organizations lead economic development and planning efforts, some lead efforts in natural resource protection, others work to strengthen the arts in the context of economic development, and still others are regional cultural institutions. Some engage in a combination of these activities. Housatonic Heritage works in partnership with all of these regional organizations, has engaged them in its own planning process, and will continue to work with them to further develop partnerships. The key partners, listed by discipline, are:

#### I. Partners in Regional Planning & Economic Vitality

1. Berkshire Chamber of Commerce
2. Berkshire Regional Planning Commission
3. Berkshire Taconic Community Foundation
4. Berkshire Visitors Bureau
5. Northwest Connecticut Council of Governments
6. Northwestern Connecticut Regional Planning Collaborative
7. Western Connecticut Convention & Visitors Bureau

#### II. Partners for Arts, Culture, and Historic Preservation

1. Berkshire Creative
2. Berkshire Historical Society
3. Berkshire Museum



*Beaver-flooded wetlands mark the entire South Taconic range. The dead trees make ideal locations for heron roosts and rookeries.*

4. Connecticut League of History Organizations
5. Crane Museum of Papermaking
6. Hancock Shaker Village
7. Institute for American Indian Studies
8. Northwest Arts Council

#### III. Partners in Education

1. Bard College at Simon's Rock
2. Berkshire Community College
3. Massachusetts College of Liberal Arts
4. University of Connecticut at Torrington
5. University of Massachusetts Amherst

#### IV. Partners in Environmental Stewardship

1. Housatonic Valley Association
2. Northwest Conservation District
3. The Trustees of Reservations

### 4.5.1 Partners in Regional Planning & Economic Vitality

The mission for these organizations is to maintain and enhance the region's quality of life. Specifically, their goals include: acknowledging and protecting natural

## Chapter 4: Development of the Management Plan *continued*



*Berkshire Scenic  
Railway & Museum,  
Lenox, MA*

and cultural resources; encouraging particular and sustainable regional settlement patterns; guiding best practices in the built environment; encouraging and facilitating sustainable economic development; and serving as a conduit between towns and out-of-area resources for engaging in the above activities.

### **1. Berkshire Chamber of Commerce**

Since the inception of the regional educators' program (Upper Housatonic Valley Experience), the Berkshire Chamber of Commerce has been an ardent supporter that has helped to grow the program. Providing logistical support (mailings, database maintenance, arranging meeting sites for the week-long event), The Chamber has evolved its partnership with Housatonic Heritage.

Recently the Chamber implemented a new Youth Leadership Program that emulated many of the economic vitality goals of Housatonic Heritage. Currently, there are plans to work with the Chamber to expand this program (in tandem with the Upper Housatonic Valley Experience)

to provide complementary experiences—both in the cultural and in the business environment—for area youth.

The Youth Leadership Program (YLP) seeks to develop young individuals to be the next generation of community leaders by preparing them for constructive and responsible involvement in community affairs, perhaps along career pathways in Berkshire County. Youth Leadership is countywide in scope. The program brings together a diverse group of students from public and private high schools in the Berkshire area. The interaction among youth from all parts of the county encourages mutual respect, dispels misplaced fears, and results in a shared concern for a continuing commitment to the growth and advancement of the Berkshire area.

The program has been developed for high school juniors who will apply in the spring semester of their sophomore year. Applicants will be selected based on demonstrated leadership qualities both inside and outside the

## Chapter 4: Development of the Management Plan *continued*



*Picnicking on the lawn at Tanglewood overlooking the Stockbridge Bowl.*

classroom. The \$100 tuition is affordable, and financial aid is available.

The Youth Leadership program provides the opportunity for students to learn and practice the skills necessary to become productive workers and community leaders. Throughout the ten-month-long program, students explore our community—its resources, leadership, issues and opportunities. They share ideas and learn what it takes to become a consensus builder and effective decision-maker. Participants examine the functional areas of business and the career pathways found right here in their own backyards. They explore civic responsibility and the various roles they can play in their communities to inspire a life-long commitment to the Berkshires.

**Agreed Action:** *The Berkshire Chamber of Commerce has agreed to provide ongoing logistical support for heritage programs and to provide points of contact for critical funding and student-learning opportunities within the business community. Most importantly, The Chamber has agreed to continue providing logistical and office support as Housatonic Heritage develops and expands the Upper Housatonic Valley Experience teachers' course.*

### **2. Berkshire Regional Planning Commission**

The Berkshire Regional Planning Commission (BRPC) is the state planning organization in the 32 Berkshire cities and towns. Enabled through legislation, its planners engage in transportation, economic, environmental, and community

planning. Their plans are based on four guiding principles or broad statements of intent: 1) spatial efficiency in land use development and management; 2) preservation of sensitive environments and open space; 3) economic development and fiscal responsibility; and 4) social equality and quality of life.

One of their current projects is Sustainable Berkshires of which Housatonic Heritage is an active member of the consortium. With major funding from the U.S. Department of Housing and Urban Development, it is a comprehensive four-year planning project that will serve as guide for public, non-profit, and private initiatives and investment in the county for the next 20 to 30 years.

The plan will be developed from 2011- 2014, ultimately establishing long-range regional priorities in eight areas. The strategies identified in the plan will be implemented through public, private, and non-profit partners across the region. They will look at historic and cultural resources, conservation and recreation, business and economy, health and wellness, housing and neighborhoods, energy, land use, and local food and agriculture. The implementation of the core plan is expected to take an additional eight to ten years, however the leadership provided by this project has prompted new proposals for expanded trails.

For the past five years, Housatonic Heritage and BRPC have worked closely on regional



## Chapter 4: Development of the Management Plan *continued*

recreational trail initiatives. This partnership (including MA Dept. of Recreation & Conservation, NPS RTCA and others) has provided a framework whereby all Berkshire County municipalities may provide public forums for support of the concept, funding for continued planning and implementation, and visibility for the project. Collaborative projects currently include complete mapping of primary and alternate cycling routes throughout the region and beyond (GIS data layer is the goal), coordination with similar state, municipal and grassroots organizations at all termini, drafting a “ride it now” regional cycling route, and the creation of a website and brochure to support a permanent regional network of non-motorized trails.

These organizations have recently expanded the scope of the project and the partnership by collaborating on the Western New England Greenway (WNEG) project. WNEG is a proposed bicycling route that will connect New York City with Montreal, Canada. The corridor being pursued largely follows Route 7 through the very western portions of CT, MA, and VT. It would link with the East Coast Greenway at the Merritt Parkway near Norwalk, CT, at the Southern terminus, and with the Quebec’s Route Verte at the Northern terminus (Canadian border).

Other projects at the BRPC related to the Housatonic Heritage mission include drafting scenic byways programs and community development block grant administration for the towns— projects such as streetscape and ADA accessibility. BRPC has been selected by the state Department of Energy Resources (DOER) to provide technical assistance to any Berkshire community interested in becoming a Green Community, a special designation for towns and cities that meet five clean energy benchmarks.

**Agreed Action:** *BRPC has agreed to provide mapping and logistical support for both the Massachusetts portion of the regional trail network and the larger Western New England Greenway*



*Cover to Paddling Guide, published in 2012 in cooperation with the Housatonic Valley Association.*

*(WNEG) project. Additionally, BRPC has agreed to negotiate state MOUs for the WNEG with CT, MA and VT. BRPC provides technical expertise, GIS Mapping, financial support and regional forums for building consensus, and is seated on the Housatonic Heritage Trails & Greenways Committee as a permanent member.*

BRPC has agreed to assist in developing a regional approach to surveying and evaluating the state of agriculture, including open space, land use and historic barn preservation initiatives. Through a series of public meetings, BRPC and Housatonic Heritage are developing a framework through which municipalities, organizations and landowners may approach preservation issues cohesively.

BRPC has agreed to work in partnership with Housatonic Heritage and others across the region to develop a regional sustainability

## Chapter 4: Development of the Management Plan *continued*



*Sculptor Henry Hudson Kitson used Santarella, in Tyngham, MA, as his studio in the 1930s & 40s.*

plan. In addition to traditional planning topics, the new plan will pay particular attention to nontraditional economic activities, such as green house gas emissions, climate change adaptation measures, energy conservation and renewable energy generation, community health and wellness, social equity and justice, and food security.

### **3. Berkshire Taconic Community Foundation**

Since 1987, BTCF has built community philanthropy to support programs in education, health care, basic human services, transportation, the arts, and youth and senior programs. A total of \$100 million has been distributed through Berkshire Taconic in its first 25 years. Other priorities of BCTF that relate to the work of Housatonic Heritage include continuation of the Center for Nonprofit Excellence training programs for nonprofit management and a strong commitment to continued work with public schools via numerous education enrichment funds.

Operated by The Pew Charitable Trusts, the Cultural Data Project (CDP) is a powerful online

management tool designed to strengthen arts and cultural organizations. By collecting data from multiple sources and providing analysis, CDP allows non-profits to contribute their own audience information (mailing lists, attendance records, etc.) and view their performance through a regional matrix of data contributed by others. This ultimately enables participating organizations to track trends and benchmark their progress through reporting tools. It empowers researchers and arts advocates to make the case for arts and culture and equips funders with data to plan and evaluate grant-making more effectively. Housatonic Heritage will enable small heritage organizations to participate by providing informational seminars, interns to aggregate data, and technical assistance in organizing, submitting, and interpreting data from CDP.

**Agreed Action:** *Berkshire Taconic has agreed to provide meeting space and support for the Housatonic Heritage Board of Trustees and the standing committees. Through their Program Office, BCTF has agreed to provide guidance for securing funding through their network of*



## Chapter 4: Development of the Management Plan *continued*



*Historic one-room schoolhouse in Richmond, MA*

donors. BTCF also provides expert investment of Housatonic Heritage's operating fund to insure maximum return on long-term assets.

#### **4. Berkshire Visitors Bureau**

The mission of the Berkshire Visitors Bureau (BVB) is to stimulate year-round interest and visitation to the Berkshires through overnight travel, increased attendance at attractions, and patronage of area businesses. BVB has 650 members and 1.4 million page viewers of the Berkshires.org website. Their 2012 strategic marketing proposal with Housatonic Heritage is in Appendix 9. The main focus for Housatonic Heritage in 2013 is to increase public awareness of regional heritage related activities through the BVB's extensive contact network.

**Agreed Action:** *BVB has agreed to provide expert marketing services (print, online, email)*

for Housatonic Heritage programs and events. In addition to prominent listings on their highly-visited website, BVB also provides creative support for ad creation, press release distribution, and email outreach to both residents and potential visitors. BVB fills the role of Housatonic Heritage's marketing department; for every \$1 that Housatonic Heritage pays BVB, they provide \$5 worth of expert marketing

#### **5. Northwestern Connecticut Council of Governments**

Through local ordinance, the municipalities within each of the Connecticut planning regions have voluntarily created one of three types of regional planning organizations allowed under Connecticut statute (a Regional Council of Elected Officials, a Regional Council of Governments, or a Regional Planning Agency) to carry out a variety of regional planning and other activities on their behalf. In the



## Chapter 4: Development of the Management Plan *continued*



*Front door of  
Mission House in  
Stockbridge, MA.  
It was built in 1742.*

Northwestern part of Connecticut, it is a Council of Governments.

The Northwestern Connecticut Council of Governments (NWCCOG) states that the “overwhelming sentiment in the region is to maintain the region’s rural feel.” There is growing recognition that the region’s good fortune in avoiding suburban sprawl is not likely to continue without active participation by the region’s towns and residents, advocating for village districts, historic districts, large lot zoning, sewer avoidance, and open space preservation.

Their regional plan for conservation in the Northwest corner of CT includes the following activities: support the preservation of the region’s open space; support active agriculture; and support the expansion of bicycle and pedestrian networks in the region. Since 2006 Housatonic Heritage has been convening a regional bike trail committee to promote interstate biking

and walking trails. In cooperation with NWCOG and Northwest (CT) Conservation District, Housatonic Heritage advocates for legislation to support funding for non-motorized trails, improved cooperation between state agencies (public roadways), communication between cycling groups and town governments, and advocacy for open-space preservation and land conservation measures.

**Agreed Action.** *In addition to cartography services, NWCOG has agreed to provide a platform through which to reach the governing body of each of the nine CT municipalities that Housatonic Heritage serves. For regional trail projects, NWCOG provides the credentials necessary when applying for state and federal grants for trails, and has agreed to continue to do so.*

### **6. The Northwestern Connecticut Regional Planning Collaborative**

The nonprofit NCRPC helps local planning and

## Chapter 4: Development of the Management Plan *continued*



*Dancers at Jacob's Pillow outdoor stage.*

zoning commissions keep abreast of issues, solutions, and opportunities for funding. Focusing on affordable housing and village center vitality, the organization is concerned with both quality of life and sense of place. In partnership with area businesses, and state and municipal funding, Housatonic Heritage provides expertise and funding for regional branding as well as website and brochure development to encourage and promote heritage tourism.

**Agreed Action:** *The Northwestern Connecticut Regional Planning Collaborative has agreed to assist in the development of a regional identity program that includes road signage, website design, and brochures. The Planning Collaborative will provide a public forum for collecting and evaluating ideas and gaining support from the municipalities and other key stakeholders.*

### **7. Western Connecticut Convention and Visitors Bureau**

Travelers to the region use the resources and information of this organization in planning. Organizational priorities for the near future

include attracting more visitors into the area and presenting them with interesting opportunities to explore the area. It is funded by the State of Connecticut. Northwest Connecticut, like the southern Berkshire part of the heritage area, is very rural, and its offerings for visitors center on nature, history, and culture. Housatonic Heritage has facilitated a meeting between the Berkshire Visitors Bureau, the Western CT Convention & Visitors Bureau, Bennington Area Chamber of Commerce and various lodging properties in three states to assess the viability of creating a group tour by motorcoach destination for domestic and foreign visitors. This may be an opportunity for the heritage area to use its connection with tourist-friendly heritage sites to drive economic expansion for the region.

**Agreed Action:** *The Western Connecticut Convention and Visitors Bureau (WCTCVB) has agreed to provide online mapping and website support for a 'farm to table,' local dining initiative. Working closely with Berkshire Visitors Bureau, Housatonic Heritage will provide region-wide*



## Chapter 4: Development of the Management Plan *continued*



LEFT: Galleries at Norman Rockwell Museum  
RIGHT: The Old Corner House, Stockbridge, MA

*marketing for the locavore movement and will support area restaurants, farmers and other food producers to raise visibility for sustainable local agriculture. Additionally, the WCT CVB provides ongoing promotion for Housatonic Heritage activities.*

### **4.5.2 Partners for Arts, Culture, and Historic Preservation**

Housatonic Heritage implements programs with significant input from partnerships with regional arts organizations. These partnerships increase the capacity of the arts organizations. After a process of focus groups and the establishment of an advisory committee, Housatonic Heritage determined its role as catalyst and clearinghouse for local history organizations and established the History Alliance in 2009. Partnering with the New England Museum Association, Housatonic Heritage offered in 2010 a two-day intensive conference for area history organizations, followed by workshops on focused topics. Currently, the History Alliance is determining how to best help its members resolve issues related to preservation and storage of artifacts, a concern among both the large and small organizations.

### **8. Berkshire Creative**

Berkshire Creative (BC) is dedicated to sustaining and growing the creative economy in ways that positively impact the region through economic development, programming, and marketing for creative economy workers. BC sparks collaborations between artists,

designers, cultural institutions, and businesses. BC has been critical to the region's vitality, representing and supporting the nearly 6,000 workers in the creative economy that touch every aspect of life in the region.

In the next five years, BC will work to create and retain jobs and economic opportunity, increase public awareness of the creative economy's impact, foster a favorable climate for creative enterprise, and build capacity with effective governance, management, strategic partnerships, and funding. Members of BC's executive committee serve on Housatonic Heritage advisory committees and participate in its programs as advisors and programming partners.

**Agreed Action:** *Berkshire Creative has agreed to provide guidance and technical expertise as Housatonic Heritage begins to work with the region's creative economy workforce and develop cooperative plans for bolstering BC's economic development capacity.*

### **9. Berkshire Historical Society**

The Berkshire Historical Society (BHS) is a non-profit corporation dedicated to collecting, preserving, and disseminating the history of Berkshire County in western Massachusetts. The historical society preserves and interprets Arrowhead, home of author Herman Melville, which was the first National Historic Landmark to be so designated in Berkshire County.



## Chapter 4: Development of the Management Plan *continued*



*Restored Gardens  
at Edith Wharton's  
Mount, Lenox, MA*

Recently Housatonic Heritage partnered with BHS to create the “Melville Trail,” a series of sites throughout Berkshire County that author Herman Melville was known to frequent, and which provided inspiration for some of his most famous writings. A brochure, website and on-site interpretive panels were formally dedicated in fall 2012.

The ongoing literary-heritage program “writer-in-residence” is also an important collaborative program between Housatonic Heritage, Arrowhead and the Berkshire Historical Society, Pittsfield Public Schools, and the Pittsfield Cultural Development office. The goal is to create a collaborative project between the local school system and history organizations using an activity that is related to the organization’s mission, in this case writing.

**Agreed Action:** *Berkshire Historical Society and Housatonic Heritage have agreed to further expand*

*and refine the Writer-in-Residence program and to bring the program to additional historic sites and school systems while continuing to host is at Arrowhead for the foreseeable future.*

*BHS remains an anchor for the History Alliance program, and has agreed to provide technical expertise in interpretation and collections-care, and to host future meetings and educational events at their facility.*

### **10. Berkshire Museum**

The mission of the Berkshire Museum in downtown Pittsfield is “bringing people together for experiences that spark creativity and innovative thinking by making inspiring educational connections among art, history, and natural science.” The museum was founded in 1903 by paper manufacturer Zenas Crane who sought to bring wonders from across the globe to rural western Massachusetts. The Museum holds 30,000

## Chapter 4: Development of the Management Plan *continued*



artifacts, including an Egyptian mummy, paintings of the Hudson River School, and objects from Robert Perry's North Pole expedition.

The Berkshire Museum has been pivotal in supporting a regional approach to interpreting the historical and prolific papermaking industry. Their support of the Paper Heritage Trail has been instrumental in bringing this historical industry to the public.

**Agreed Action:** *Berkshire Museum has agreed to provide expertise, public relations assistance and access to their audience as Housatonic Heritage cooperatively researches and interprets the Berkshires Native American Trail along the Housatonic River, specifically the West Cornwall to Cornwall (HouBike Trail) segment. In addition, the museum will share its expertise in collections care with small museums through the History Alliance.*

*In addition, Berkshire Museum has agreed to explore new avenues for interpreting papermaking heritage that may include exhibits, interactive activities at the museum, and papermaking classes for students, either in-museum or in-classroom.*

### 11. Connecticut League of History Associations

The mission of the Connecticut League of History Organizations (CLHO) is to encourage and support the activities of history organizations throughout the state, promote professional standards, serve as a network for the exchange of information, and advance historical



LEFT: *Institute for American Indian Studies in Washington, CT.*

RIGHT: *Entry drive to Edith Wharton's Mount, Lenox, MA*

interests at the state level. Their goal is to work with existing groups to build networks so that regional groups can work together to solve problems. The CLHO is an ideal partner for Housatonic Heritage as it ramps up similar programs in Western Massachusetts.

**Agreed Action:** *CLHO has agreed to provide educational materials, expertise, presentation materials and presenters to build capacity among Berkshire County history organizations. This cooperative agreement will allow Housatonic Heritage to deliver quality educational programming at a fraction of the cost and to build stronger bonds between organizations in both states.*

### 10. Crane Museum of Papermaking

The Crane Museum of Papermaking has provided visitors with a superb interpretive look at the historic paper industry in the Upper Housatonic Valley since 1930. The museum is housed in what was the Rag Room of Crane's 1844 Old Stone Mill which is on the National



## Chapter 4: Development of the Management Plan *continued*



*The gardens at The Mount were designed by Edith Wharton.*

Register of Historic Places. The one-story building is situated on the banks of the Housatonic River which supplied water to wash the rags and drive the machinery of the early Crane mills. The museum showcases artifacts, interpretive materials, visitor services, and hands-on paper making equipment to teach the art. The papermaking tradition is carried on in nearby buildings.

**Agreed action:** *The Crane Museum of Papermaking has agreed to provide expert technical assistance and access to their archives for the purpose of accurately interpreting this industry and furthering the development of the Paper Heritage Trail. The Crane & Company “official historian” is a member of, and works directly with, the Paper Heritage Trail to insure authenticity in its programming and publications.*

*In addition, the Crane Museum has agreed to make its educational paper making facility available for select teacher- and school-groups use when integrated into a larger curriculum that includes industrial heritage as a discipline.*

### 13. Hancock Shaker Village

Hancock Shaker Village (HSV) brings the Shaker story to life and promotes understanding of the aesthetics, beliefs, achievements,



*Berkshire Community College was founded in 1960 as the first community college in Massachusetts. It now enrolls 8,000 students annually.*

and controversies that have defined the Shaker experience in America. . This restored village of twenty buildings, set amongst acres of farm, woodland and pasture, is home to the premier collection of Shaker buildings and artifacts. The Shaker beliefs in racial and gender equality, simplicity, and pacifism are of keen interest to the public. Today, this living museum provides incredible opportunity for interpretive experiences, and is a highly-visited destination for school groups.

**Agreed Action:** *Hancock Shaker Village has agreed to partner with Housatonic Heritage to provide low- and no-cost educational programming and field trips for area students.*



## Chapter 4: Development of the Management Plan *continued*

### 14. Institute for American Indian Studies

The Institute for American Indian Studies (IAIS) is a museum for the study of the rich cultural diversity of the Indian people who have always lived in North America and who are still here today. Located in Washington, CT, just outside of the heritage area, IAIS is a place to hear the voices of Native Americans; their primary focus is on the Algonkian peoples who make up the Northeast's many native groups. IAIS conducts research and presents education programs, exhibits, and special events.

**Agreed Action:** *The Institute for American Indian Studies has agreed to provide expertise, public relations assistance and access to their audience as Housatonic Heritage cooperatively researches and interprets the Berkshires Native American Trail along the Housatonic River, specifically the West Cornwall to Cornwall (HouBike Trail) segment.*

### 15. The Northwest Connecticut Arts Council

The Northwest Connecticut Arts Council is a "hub" for arts, artists, and cultural information in the 27-town region they serve. Through events, newsletters, and monthly direct-mail events calendar the Arts Council engages and promotes the arts and cultural resources of Northwestern Connecticut. The Council seeks to improve the quality of life in the region, assist artists and cultural organizations in their efforts to thrive, and inform the general public about the arts and culture of the region.

Housatonic Heritage supports the ongoing work of the Arts Council by convening organizations like this one, across the state line and within the states and regions to ensure there is no duplication of programs and services and to facilitate information sharing.

Regional arts council views collaboration with Housatonic Heritage as part of their clearing-house role and agree that mutual information sharing will continue, each assisting the other with outreach. Housatonic Heritage and NWCT

Arts Council recently collaborated on the "Open Your Eyes" Artist Studio Tours, a public event to raise the visibility of area artists, just one of many potential programs where collaborative work (funding, promotion, advocacy) serve to make the overall program stronger than its individual parts.

**Agreed Action:** *The Northwest Connecticut Arts Council has agreed to provide promotion of cooperatively produced events via their popular website and print calendars. In addition they provide coordination and logistical support, like mailings and staffing, for cooperative regional cultural events.*

### 4.5.3 Partners in Education

Area institutions of higher education are natural partners for Housatonic Heritage as it works to engage the next generation and bring people together with similar interests.

### 16. Bard College at Simon's Rock

Established in 1966, Simon's Rock in Great Barrington, Massachusetts, is both a major south Berkshire employer and a vital part of the community fabric of this part of the heritage area. Since the inception of the African American Heritage Trail (AFAM), Bard College at Simon's Rock has provided critical support by lending faculty to the AFAM project's Advisory Council. They have provided essential public-presentation space for events and public forums, and have shared their research with the program

**Agreed Action:** *Its work with the AFAM Trail and the Arts Heritage Project has made it an important programming and potential strategic partner. Bard College at Simon's Rock has agreed to continue to provide academic expertise, to continue to sit on the AFAM Advisory Council, and to host AFAM program events on campus.*

### 17. Berkshire Community College

Founded in 1960, Berkshire Community College (BCC) was the first community college established by the Commonwealth of Massachusetts.

## Chapter 4: Development of the Management Plan *continued*



Lake Pontoosuc,  
Pittsfield, MA

Faculty and staff have coordinated the Teach the Teachers (UHVE) for 10 years.

**Agreed Action:** *BCC has agreed to provide logistical support for the annual UHVE. In addition to providing staffing for public relations, BCC also assist with event coordination, kick-off and wrap-up events, plus meeting facilities. BCC continues to make the UHVE program viable by arranging all teaching sites and providing pertinent tools to make the visits meaningful.*

### 18. Massachusetts College of Liberal Arts

Massachusetts College of Liberal Arts (MCLA), the state university campus located outside the region, is involved on many region wide community and economic development activities, and collaborates programmatically with Housatonic Heritage on its initiatives, including the Teach the Teachers (UHVE). As the course's academic home and granter of graduate credits, MCLA contributes time and expertise from its science, humanities, and education faculties.

**Agreed Action:** *MCLA has agreed to act as the credit-granting institution, and to provide faculty to assist in the preparation and grading of the UHVE teachers' classroom curricula (produced as a result of taking the UHVE course). MCLA has committed to growing the program by adding a Masters level Independent Study component for graduate students.*

*As part of the African American Heritage Trail, MCLA has committed to launching new curriculum materials: Du Bois Curriculum in a Box, for grades 4-8 and 9-12, spearheaded by Prof. Frances Jones-Sneed of MCLA, and has agreed to develop*

*and launch African American Heritage curriculum materials website for teachers and scholars.*

### 19. University of Connecticut at Torrington

The Torrington Campus (UConn Torrington) is actively involved in economic development and the arts and is the home of the Litchfield County Writers Project, which, in addition to housing a collection of the published works of Litchfield County authors, includes programs and seminars by and about those authors. UConn Torrington, Housatonic Heritage and other regional collaborators have invited land use commissioners and other interested residents to workshops addressing community planning and design issues, conservation strategies, and economic development impacts. These workshops are supported by Northwestern Connecticut Council of Government and the Litchfield Hills Council of Elected Officials, the Northwest Conservation District and Northwest Connecticut Planning Collaborative. A multi-year partnership with Housatonic Heritage yielded the 'Locally Grown History' program what paired history organizations with agricultural heritage to create a multi-discipline thematic trail.

**Agreed Action:** *UConn Torrington has agreed to provide access to University resources for design, printing, and distribution of program materials. Additionally, they have agreed to provide staff time to coordinate events and publicity, and expertise via Rob Forbes, History Professor.*

### 20. University of Massachusetts Amherst

While the university is physically located just outside of the area, many programs are

## Chapter 4: Development of the Management Plan *continued*



*Located on the town green in Sheffield, MA, The Old Stone Store hosts exhibits and programs about local history..*

offered within it, and UMass Amherst has been a key partner in developing the African American Heritage Trail that encompasses 29 Massachusetts and Connecticut towns in the Upper Housatonic Valley National Heritage Area, and celebrates African Americans in the region playing pivotal roles in key national and international events, as well as ordinary people of achievement. Among the key forty-eight sites along the trail are the W. E. B. Du Bois Boyhood Homesite, a National Landmark property in Great Barrington; the Samuel Harrison House in Pittsfield, home of the 54th Massachusetts Regiment chaplain who protested discriminatory pay practices, and The Trustees of Reservations' Col. Ashley House, where in 1781 Elizabeth ("Mum Bett") Freeman successfully sued Col. Ashley for her freedom.

UMass has been a programming and strategic partner for the African American Trail, W.E.B. Du Bois Homesite project, W.E.B. Du Bois National Historic Site Project by preserving the Du Bois Homesite in Great Barrington, providing

public access to the site, installing interpretive signage and by ongoing archaeological work at the site. Just two years ago, UMass Amherst began offering a Master of Science in historic preservation through a cooperative program with Hancock Shaker Village. Housatonic Heritage plans to investigate an arrangement whereby students can use the heritage area as

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*"I was born by a golden  
river and in the shadow  
of two great hills."*

W.E.B. DuBois, *Darkwater*

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their learning lab. The report is titled "W.E.B. DuBois Homesite and Great Barrington: A Plan for Heritage Conservation and Interpretation" (Final Planning Report, July 2009).

**Agreed Action:** *In cooperation with Housatonic Heritage, Friends of Du Bois and MCLA, UMass Amherst has agreed to partner in the 2013 NEH*



## Chapter 4: Development of the Management Plan *continued*



*Jana Laiz, writer-in-residence at Arrowhead, where Melville wrote Moby Dick. Laiz took her expertise and insights into the public schools.*

*Summer Institute for College Teachers, entitled “The Shaping Role of Place in African American Biography: A New England Exemplar.”*

*In addition, UMass Amherst has agreed to partner with Housatonic Heritage to create the core components of the W.E.B. Du Bois National Historic Site:*

*The Du Bois Boyhood Homesite: A focus on archeology and interpretation based on the original Burghardt homestead and the 1969 Commemorative Boulder. The site design will build upon its contemplative nature as it exists today. Additional trails and interpretation, a gathering space for a group of 50, and a rest area with bathrooms and informational kiosk are included in the planning for this area.*

*Du Bois Downtown Great Barrington Heritage Trail: A strategy for integrating ten key*

*interpretive nodes, related to Du Bois within Downtown Great Barrington and nearby sites within the African American Heritage Trail. Some nodes could host signage while other locations could support a small kiosk with pamphlets and a display with guidance to more in-depth information, trail maps, and related events and programs.*

*Du Bois Heritage Visitor and Interpretive Center is a downtown community facility dedicated to youth programs, education, and interpretive exhibits about the life and legacy of Du Bois. The vision for the Interpretive Center is a place of interaction for hosting community youth programs and field schools, connections to a global audience and network, multi-media and changing exhibits, and venues for the scholars and artists to develop and share their work with the larger community.*



*Recreational hiking at  
Jug End Reservation  
and Wildlife  
Management Area,  
Egremont, MA*

### **4.5.4 Partners in Environmental Stewardship**

#### **21. Housatonic Valley Association**

The Housatonic Valley Association (HVA) protects land and water throughout the entire 2,000-square-mile, tri-state Housatonic River valley. Founded in 1941, HVA works to conserve the natural character and environmental health of our communities by protecting and restoring the river and its watershed. The HVA is one of the few organizations whose area closely overlaps that of Housatonic Heritage; the difference is that HVA's territory extends the entire course of the river all the way to Long Island Sound. Their overall goal of both organizations is to see the river and its watershed as one unit that happens to be divided by state lines.

The HVA Massachusetts director currently serves on the Housatonic Heritage Board of Trustees, and this relationship has led to several high-profile projects, including

publication of two recreation and conservation resource guides, the Head of the Housatonic, which covers the region from the headwaters to Kent, Connecticut, and the Heart of the Housatonic, which encompasses the area from Kent to Long Island Sound. In partnership with Housatonic Heritage, HVA recently completed the Massachusetts Paddle Guide and the Connecticut Paddle Guide companion publication. In February 2012, HVA convened a conference of the two-state agencies and non profits that are dealing with the invasive zebra mussel. That event took place at Bard College at Simon's Rock in Great Barrington.

**Agreed Action:** *HVA has agreed to provide expertise, design and design elements to produce new interpretive and outdoor recreational access materials. In addition, HVA has agreed to provide natural resource interpretation, expert paddle guides, and equipment for an ongoing series of interpretive paddling trips along the Housatonic River.*



## Chapter 4: Development of the Management Plan *continued*

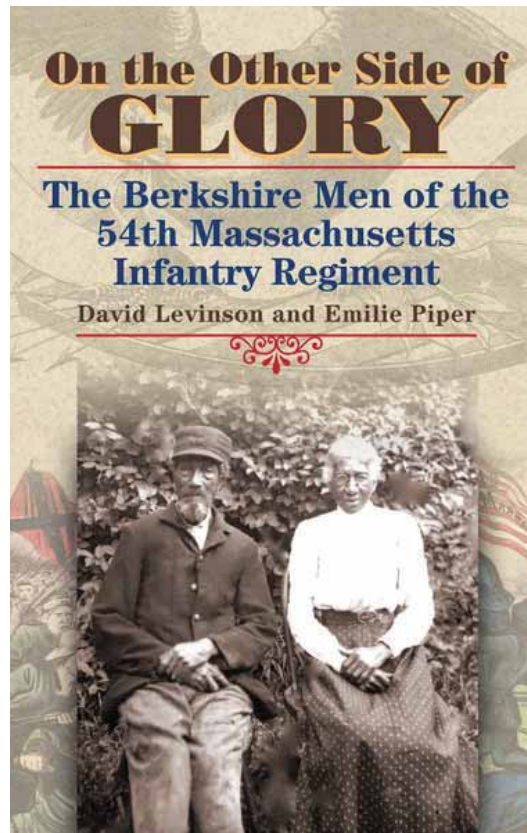
### 22. Northwest Conservation District

The Northwest Conservation District (NWCD), one of 3,000 nationally, covers the Connecticut portion of the heritage area, plus more towns to the south of it. Its staff provides technical services and education for individuals, non-profits such as land trusts, and town governments in the areas of land use and planning, sustainable development, retaining farmable lands for future agricultural use, and energy. NCD often serves as an information point on funding opportunities and new state initiatives, helping towns that might otherwise not have the means to find or take advantage of changing opportunities. NCD is concerned about engaging the next generation of land users, the children who live in their region, to make sure that they connect to their land to set the pattern for life.

**Agreed Action:** *NWCD has agreed to provide cartography and GIS mapping services as Housatonic Heritage cooperatively develops the HouBike Trail in Northwestern CT. NWCD has also agreed to provide staff time and expertise to work with the Trails & Greenways Committee in trail development and accompanying heritage interpretation.*

### 23. The Trustees of Reservations

The Trustees of Reservations (TTOR) is a private organization that acquires and manages properties of “exceptional scenic, historic, and ecological value” throughout the state for public use and enjoyment. It is the largest conservation landholder in the heritage area. Its ten-year 2007-2017 strategic plan provides guidance for land conservation efforts and includes the following goal: to engage and mobilize people and a broad range of partners to advocate and act for conservation. TTOR plans to do this by mobilizing its existing base—members, visitors, partners, and donors—and encouraging them to speak and act for conservation. TTOR plans to upgrade and integrate stewardship, visitor services, programs, and interpretation to deliver a clear and compelling message of mission and vision. TTOR has been a key partner in



*Housatonic Heritage published this book in 2011.*

interpreting the story of African Americans in the Upper Housatonic Valley and has collaborated with Housatonic Heritage to create Phase 1 of the Elizabeth “Mum Bett” Freeman Interpretive Center at the Ashley House.

**Agreed Action:** *TTOR has agreed to provide a permanent home to the Mum Bett Freeman Interpretive Center. In addition, they have agreed to manage summer interns to renovate the center, begin research and assist in erecting exhibits. TTOR has also agreed to partner with Housatonic Heritage to host an annual interpretive event ‘Mum Bett Day’ at the Colonel Ashley House and provide logistical and publicity support for this and other African American heritage events.*



## Chapter 4: Development of the Management Plan *continued*

**Table 2: Agreed Actions of Housatonic Heritage Partners**

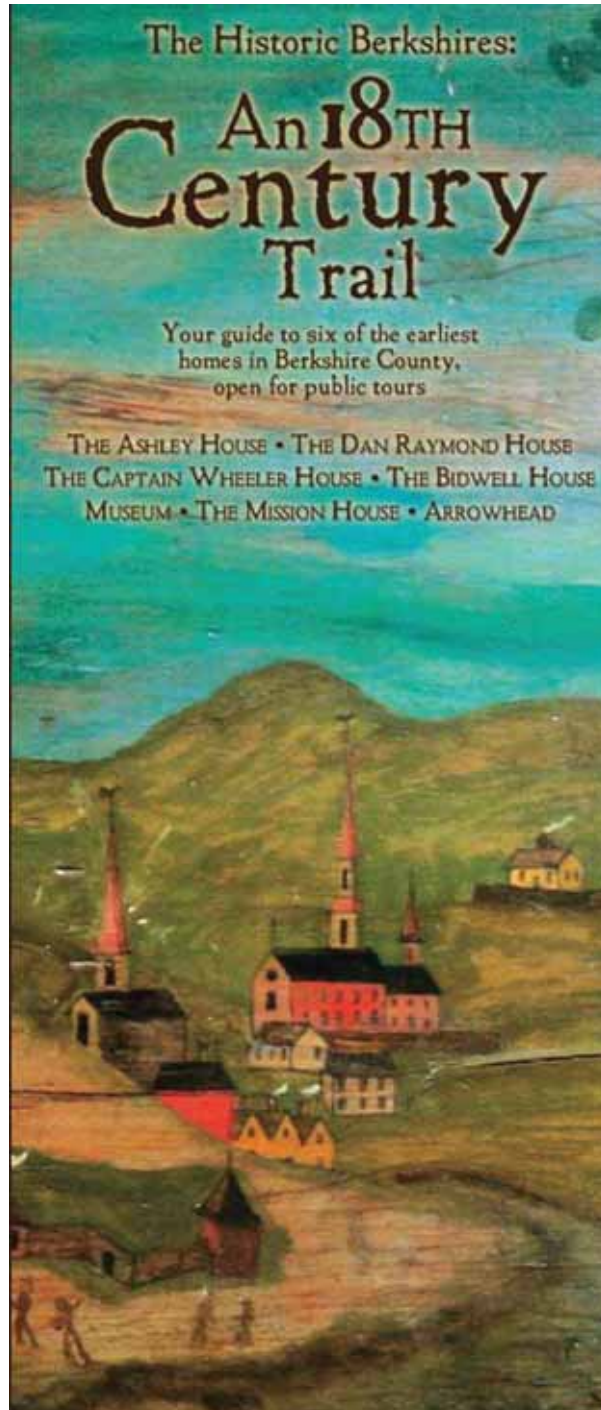
Partner	Agreed Action
1. Berkshire Chamber of Commerce	Provide ongoing logistical support for heritage programs and points of contact for critical funding and student-learning opportunities within the business community. Continue providing office support for the expansion of the Upper Housatonic Valley Experience teachers' course.
2. Berkshire Regional Planning Commission	Provide mapping and logistical support for MA portion of the regional trail network and the larger Western New England Greenway (WNEG) project. Negotiate state MOUs for the WNEG with CT, MA and VT. Assist in developing a regional approach to surveying and evaluating the state of agriculture, including open space, land use and historic barn preservation initiatives. Develop a framework through which municipalities, organizations and landowners may approach preservation issues cohesively and collectively. Participate in development of regional sustainability plan.
3. Berkshire Taconic Community Foundation	Provide meeting space and support for the Housatonic Heritage Board of Trustees and standing committees, guidance for securing funding through their network of donors, and expert investment of Housatonic Heritage's operating fund.
4. Berkshire Visitors Bureau	Fill role of Housatonic Heritage's marketing department
5. Northwest Connecticut Council of Governments	Provide cartography and a platform through which to reach the governing body of each of the nine CT municipalities that Housatonic Heritage serves. Provide credentials necessary when applying for state and federal grants for trails.
6. Northwestern Connecticut Regional Planning Collaborative	Assist in the development of a regional identity program that includes road signage, website design, and brochures. Provide a public forum for collecting and evaluating ideas and gaining support from the municipalities and other key stakeholders.
7. Western Connecticut Convention and Visitors Bureau	Provide online mapping and website support for a "farm to table," local dining initiative and ongoing promotion for Housatonic Heritage activities.
8. Berkshire Creative	Provide guidance and technical expertise for work with region's creative economy workforce. Develop collaborative plans for bolstering BC's economic development capacity.
9. Berkshire Historical Society	Expand and refine the Writer-in-Residence program to additional historic sites and school systems. Continue hosting program at Arrowhead. Host future History Alliance meetings and educational events.
10. Berkshire Museum	Provide expertise, public relations assistance, and access to their audience for Berkshires Native American Trail interpretation. Share its expertise in collections care with small museums through the History Alliance. Explore new avenues for interpreting papermaking heritage.
11. Connecticut League of History Organizations	Provide educational materials, expertise, presentation materials, and presenters to build capacity among Berkshire County history organizations. Work to build stronger bonds between states' history collections

## Chapter 4: Development of the Management Plan *continued*

### Agreed Actions of Housatonic Heritage Partners *continued*

Partner	Agreed Action
12. Crane Museum of Papermaking	Provide expert technical assistance and access to their archives for the purpose of accurately interpreting Paper Heritage Trail. Make its educational paper making facility available for select teacher- and school-groups use when integrated into a larger curriculum that includes industrial heritage as a discipline.
13. Hancock Shaker Village	Provide low- and no-cost educational programming and field trips for area students.
14. Institute of American Indian Studies	Provide expertise, public relations assistance, and access to their audience as Housatonic Heritage researches and interprets the Berkshires Native American Trail along the Housatonic River, specifically the West Cornwall to Cornwall (HouBike Trail) segment.
15. Northwest Arts Council	Provide promotion of cooperatively produced events via their popular website and print calendars, coordination and logistical support for cooperative regional cultural events.
16. Bard College at Simon's Rock	Continue to provide academic expertise. Continue to sit on the AFAM Advisory Council, and host AFAM program events on campus.
17. Berkshire Community College	Provide logistical support for the annual UHVE and staff for public relations. Assist with event coordination, kick-off, and wrap-up events.
18. Massachusetts College of Liberal Arts	Act as the credit-granting institution and provide faculty to assist in the preparation and grading of the UHVE teachers' classroom curricula. Add a Masters level Independent Study component for graduate students. Launch new curriculum materials and websites related to African American heritage.
19. University of Connecticut at Torrington	Provide access to University resources for design, printing, and distribution of program materials. Provide staff time to coordinate events and publicity and expertise.
20. University of Massachusetts Amherst	Partner in the NEH Summer Institute for College Teachers "The Shaping Role of Place in African American Biography: A New England Exemplar." Partner to create the core components of the WEB Du Bois National Historic Site, the Du Bois Downtown Great Barrington Heritage Trail, and the Du Bois Heritage Visitor and Interpretive Center.
21. Housatonic Valley Association	Provide expertise and design for new interpretive and recreational access materials. Provide natural resource interpretation, paddle guides, and equipment for ongoing series of interpretive paddling trips on Housatonic.
22. Northwest Conservation District	Provide cartography and GIS mapping services as Housatonic Heritage cooperatively develops the HouBike Trail in Northwestern CT. Provide staff time and expertise to work with the Trails & Greenways Committee in trail development and interpretation.
23. The Trustees of Reservations	Provide a permanent home to the Mum Bett Freeman Interpretive Center. Manage summer interns to renovate the center, begin research, and erect exhibits. Co-host annual "Mum Bett Day" at the Colonel Ashley House.

## Chapter 4: Development of the Management Plan *continued*



### **4.5.5 Major Priorities of Housatonic Heritage Partners**

A summary of the priorities shared by Housatonic Heritage and their Strategic and Programming Partners is below.

1. Facilitate and foster sustainable economic development that respects natural and historic resources.
2. Foster environmental, historical, and cultural stewardship while preserving and protecting natural and heritage resources and educating the public. Make connections with the next generation of users, audience, volunteers, and leaders.
3. Engage both local residents and visitors in local and regional projects and activities and use their energy for advocacy.
4. Work to establish a regional sense of place and develop programs in accordance with that identity.
5. Strengthen existing programs and encourage new

entities and collaborations. Increase capacity of smaller organizations through partnerships and collaborations.

6. Seek sustainable funding.
7. Encourage the preservation of farming and increase its economic viability.

LEFT: A partnership grant from Housatonic Heritage funded exhibit panels that tell the story of W.E.B. Du Bois's relationship to the river.

RIGHT: Collaborative project of six house museums, funded by Housatonic Heritage Partnership Grant Program.



## Chapter 5: Implementation Plan & Policies: Catalyst for Sharing our Heritage



Onato Lake,  
Pittsfield, MA

### 5.1 Implementation Plan

Housatonic Heritage Management Plan provides comprehensive policies, and strategies, for conservation, funding, management, and development of the heritage area. Policies were created through consultation with our partner organizations and have been refined through focus meetings with the Housatonic Heritage Board of Trustees and the Council of Overseers.

### 5.2 Policies to Guide Implementation

The Implementation Plan grew out of public input during a series of 25 open meetings held between 2007 and 2010. After informing the public about the Management Plan process, skilled moderators solicited ideas, suggestions for priorities, and concerns regarding proposed activities and their potential impacts.

Following the public and stakeholder meetings, the Implementation Plan was developed through a series of discussions during which the Trustees considered: public and stakeholder input; current objectives of strategic and programming partners; the ongoing work of the Housatonic Heritage programs; and an informal assessment of resources needed to sustain the interpretation of the natural and historical environments. With this data in mind, both Trustees and

Overseers have recommended that over the next ten years Housatonic Heritage adopt these policies:

1. **Stay focused on the roles for which the organization has a proven track record, specifically as a collaborator, convener, and catalyst responsive to the needs of the community.**

Serving in these capacities has proven that much more can be accomplished through partnerships than by organizations working on their own.

2. **Advance the nine core programs to new levels by expanding audiences as well as evaluating and revising existing programs.**

The objectives are to take steps to ensure the long-term financial viability of the programs and to focus on efforts that can achieve measurable goals.

3. **Adopt new heritage programs to protect, preserve, and conserve historic, cultural, and natural resources, under the theme of catalyst for sharing our heritage,** as advised by the Council of Overseers and approved by the Board of Trustees, after a public vetting process. These include historic, natural, and cultural resources, as well as artifacts and landscapes.



*Tanglewood Music Center draws 350,000 visitors annually.*

### 5.3 Implementation Plan: Five Goals & Corresponding Strategies

The following goals were adopted by Housatonic Heritage and are reflective of the organization's niche role as a regional convener and conduit for regional thinking, as well as a facilitator, advocate, coordinator, clearinghouse, and funder of collaborative programs. Special attention has been paid to include plans for resource protection and specific commitments on behalf of the region's resource protection partner organizations.

- 1. Bolster Economic Vitality by Integrating Stewardship and Economic Development**
- 2. Foster Residents' and Visitors' Knowledge of the Upper Housatonic Valley and Its Heritage**
- 3. Enrich the Experience of the Upper Housatonic Valley as a Rewarding Place to Live, Work, and Visit**
- 4. Broaden Public Support for Heritage Resources**
- 5. Preserve Historical, Natural, and Cultural Resources in the Heritage Area**

While Housatonic Heritage has been acting on these goals in a general way for a decade or more, the organization will focus on these new five clearly articulated goals to make them the centerpiece of their strategies and actions through the Implementation Plan.

The Implementation Plan has a two-tiered approach. The **first tier** is the existing nine core programs that have served as the basis for the Housatonic Heritage focus for the last decade and define the centerpiece of actions currently underway. The **second tier** is the introduction of the clearly articulated action steps to achieve the five goals that will transition Housatonic Heritage to a new area-wide focus. In this Implementation Plan, the first and second tiers have been integrated.

A description of each goal and the recommended action for achieving them are on the following pages. These include new programs as well as the continued development of ongoing core programs.

#### **5.3.1 Goal 1. Bolster Economic Vitality by Integrating Stewardship and Economic Development**

Housatonic Heritage, in its legislative mandate to improve the economic vitality of the region, has engaged its education and cultural partners in a discussion about "next steps" to bridge the relationship between residents and heritage institutions. The programs under this goal will enable residents to understand how heritage affects the region's economy and to realize how citizens hold an economic stake in the preservation of resources and culture. Heritage-based institutions have long recognized the connection between their success and the economic vitality of

## Chapter 5: Implementation Plan & Policies *continued*

the region. Tourism and travel, especially in the Upper Housatonic Valley, are critical to the area's sustainability as a bucolic place to live and work, but those same institutions have also recognized that the communities where they are located do not fully grasp the symbiotic relationship that exists. To advance this understanding Housatonic Heritage will pursue the following actions:

**1.1 Action: Develop a consumer profile for cultural organizations.** Housatonic Heritage will partner with the Western Connecticut Convention & Visitors Bureau (which currently provides similar services) to develop an economic impact and customer profile model for history and cultural institutions. In partnership with Berkshire Regional Planning Commission and Berkshire Creative, this program may be funded by the originating entities and through grants from the Berkshire Taconic Community Foundation. Through audience research and assessment heritage institutions can better understand their local and nonlocal audiences and their effectiveness at interpreting themes. Audience research is also a useful tool when these same organizations gauge the effectiveness of their education, experiential, or interpretive programs. Organizations that rely on attendance at events or a membership base as sources of sustainability have expressed an interest in seeing Housatonic Heritage fill this role. Housatonic Heritage may also help these organizations understand the result of the research and make corresponding adjustments to their programming. Audience polling and market research go hand-in-hand with developing and diversifying audience.

**1.2. Action: Take an active role in devising solutions to the problems of local food and agriculture, conservation, and recreation and historic preservation.** Working as a member of the Advisory Council for Sustainable Berkshires, a HUD funded project, Housatonic Heritage will continue to take an active role in devising solutions to the problems



*Pittsfield (MA) State Forest boasts two camping areas and 30 miles of trails that follow the crest of the Taconic Mountain Range separating MA from NY*

of local food and agriculture, conservation, and recreation and historic preservation. When the solutions are identified in 2013-14, Housatonic Heritage will be directly involved in many of the initiatives, including the Keep Farming Berkshires which will address the processing and distribution challenges for local farm goods and other locally produced products. Solutions will require the regional-thinking mindset that is the cornerstone of this national heritage area's policy. A regional approach is often required when large-scale change is needed, and Housatonic Heritage is, as a result of the public scoping sessions, the *de facto* nominee to lead this charge. Large-scale solutions to the region's challenges will only be realized when those challenges are identified, prioritized, and approached through innovative solutions.

**1.3 Action: Seek relevance for the Paper Trail to the current industry in addition to developing programs and increasing knowledge of the past.** The Paper Trail will make steps to





*Since 1826, the Shakers' round stone barn has attracted visitors, notably Herman Melville and Nathaniel Hawthorne who held a footrace inside. Hancock Shaker Village.*

engage partners, in addition to the Berkshire Museum, to investigate possible permanent Lee sites for storage and display of paper industry artifacts and regional education about the paper industry history.

- 1.4 Action: Expand Heritage Walks duration from two to four weeks to draw more visitors to the region and to engage a new audience, younger children with their families and youth. Expand to offer youth-led walks, hands-on components and offerings including poetry walks, moving meditation, art walks, theatrical walks in which character actors recreate famous scenes from history.** Develop programming partnerships with organizations such as Osher Lifelong Learning Institute for retired adults, schools, and other groups, to ensure multigenerational participation. Create downloadable versions so walks can be taken virtually.
- 1.5 Action: For bike, hike, and paddle trails, design and install parking areas, kiosks, and**

**wayfinding markers at strategic trailheads.**

Enhance the visitor experience by providing heritage interpretation about key sites along designated trails.

- 1.6 Action: Engineer and design a dedicated walking and biking trail in Cornwall, CT, that is part of a family-friendly network of off-road recreational trails that connect village centers with each other, with schools, and with state parks and other wilderness areas.** Provide interpretive materials to enhance the experience.
- 1.7 Action: Explore the feasibility of creating a home base with living facilities, training room, storage space for tools for summer interns who come to work in historic or natural sites.**
- 1.8 Action: Increase the maximum grant funding level to \$10,000 to allow for larger projects.** Continue to use the fund strategically to leverage funds and to identify areas of emphasis for Housatonic Heritage.

## Chapter 5: Implementation Plan & Policies *continued*



LEFT: Crane Museum of Papermaking, Dalton, MA

RIGHT: Great Barrington Walking Tour can be downloaded.

### **5.3.2 Goal 2. Foster Residents' and Visitors' Knowledge of the Upper Housatonic Valley and its Heritage.**

Through its programs and collaborative ventures, Housatonic Heritage weaves together a comprehensive picture of the region's unique heritage by highlighting four interpretive themes. An underlying goal for each existing and proposed program is the creation of stewardship for natural, cultural, and historic resources to encourage long-term results.

- 2.1 Action: Tie themes and heritage-related organizations together by building on the trail concept to link historic properties.** Begin staging drama and dramatic personalities performing at related sites and working with professional theatre partners to produce two-actor vignettes at selected sites to create a drama chain in spirit of creative place-making. Videos of performances may be edited for classroom use.
- 2.2 Action: Schedule National Park Service interpretive planning specialists to deliver training workshops at Housatonic Heritage in how to create comprehensive interpretive themes that inter-relate sites.**
- 2.3 Action: Initiate cultural festivals** to create efficient virtual and physical exposure, such as "open house" days, all on the same day, to focus visitors' attention and to immerse them in the abundant offerings near where they live and work.
- 2.4 Action: Package podcasts to increase exposure of small heritage and cultural**

**organizations.** Housatonic Heritage has demonstrated success with its first podcast of a historical walking tour of downtown Great Barrington, made in cooperation with the Great Barrington Historical Commission. The rollout of this product has sparked interest among other municipalities and history organizations. In the next five years, Housatonic Heritage will work with partner organizations which will provide images, text, local-history expertise, and in-kind services. Housatonic Heritage will provide technical expertise and low-cost production of the digital media through existing agreements with area studios.

- 2.5 Action: Help sites make conversions and package smartphone tours, podcasts, and other digital media.** Most small heritage organizations' websites are not compatible with smart phones so website information cannot be accessed by a large potential audience.
- 2.6 Action: Research and the develop print/web/multimedia materials to communicate why this region has attracted artists and how that heritage has shaped our cultural life here today.** One possibility is the assembling of stories from "backstage" of celebrated organizations, the difficulties encountered in their start-ups, the challenges along the way, the people who made things happen, and the current issues of concern.
- 2.7 Action: Develop and support secondary African American trail sites** such as: NAACP leader James Weldon Johnson's writing



*Outfitted to ride a family-friendly Kent (CT) Bike Route from the Housatonic Heritage brochure*

cottage in Great Barrington; Wizard's Glen in Dalton where a cluster of a dozen cabins housed a small community of African Americans (a cave beneath the road was possibly an Underground Railroad site); and the Hoose House in Dalton which is one of the last surviving houses of that Black community, now on the National Register of Historic Places.

**2.8 Action: Support the ten-year goal of the Du Bois National Historic Site as it seeks \$10 million to create a national destination for learning about the life and legacy of Du Bois.** In addition to holding archives related to African Americans in the region, the site will maintain rental meeting space, performance space, and public exhibition space. The rural setting in Great Barrington is the ideal place to contemplate Du Bois origins, influences, vision, and challenges.

**2.9 Action: Convene interpretive programmers in the region and charge them with developing a comprehensive interpretive plan that will enhance and reinforce the messages of Housatonic Heritage.** Use the interpretive matrices in Appendix 3 as a basis for planning.

### **5.3.3 Goal 3. Enrich the experiences that make the Upper Housatonic Valley a rewarding place to live, work, and visit.**

The goal is for Housatonic Heritage to enhance partner activities by adding a next step that will broaden and deepen their reach, such as by integrating the best of rural attributes with those of the urban areas and by making urban offerings easily accessible to those in rural areas. Moreover, quality of life issues will be addressed through partnerships with industries that have historically occupied the valley.

**3.1 Action: Complete the network of hiking, biking, and walking trails and promote them both as destinations and as pathways for personal transportation. Make urban parks accessible by bike trail and ensure that rural trails join urban ones. Create a downloadable pod cast audio tour of the bikeways.** Develop a plan for best future locations of off-river bikeway sections in Cornwall and Kent.

**3.2 Action: Develop a sustainable Bikeway Monitor Program and safety plan. Produce and install directional markers and approximately twelve interpretive signs containing natural resource, historical, and**



stewardship information specific to each site along the Bikeway.

- 3.3 Action: Create a web-based central portal for all trails and river access to consist of a central data base on location, parking, access points, and landmarks.** It will be updated with trail conditions, boat rentals, and weather. Add uniform signage to create a cohesive identity within the Housatonic Heritage region.
- 3.4. Action: Create paddling guide with online companion that is smartphone enabled and has downloadable PDF's.** It will be co-produced by Housatonic Heritage and the Housatonic Valley Association.
- 3.5 Action: Create an Accessible Trail guide that lists all of the wheelchair accessible trails in the heritage area,** including a half-mile loops at Lake Mansfield and at Pleasant Valley in Lenox.
- 3.6 Action: Link heritage topics with today's issues, such as bio-fuels, locavore practices, enviro-startups and support economic activities like farming and clean water that help maintain the pastoral landscape.** Use the century-old concerns with the quality of Housatonic River water to elucidate today's water issues. Support teaching about clean water (past and present) in schools and teaching the relationship between industry and the environment by teacher tours of InterPrint, a large printing company, and the Pittsfield Covanta Trash to Energy Plant, and the wastewater treatment facility.
- 3.7 Action: Emphasize preservation of a viable rural economy by helping to safeguard productive working landscapes.** Organic and other landscape- and ecologically-friendly forms of farming and forestry should be especially encouraged and rewarded. Strongly support efforts like those of the nonprofit Berkshire Grown which promotes locally grown agricultural products, farm stands and other products like furniture crafted from local sustainably harvested local wood.
- 3.8 Action: Sponsor public 'heritage fairs' to provide residents with a wide array of**

**information about regional offerings.** In conjunction with the Berkshire Visitors Bureau and the Western CT Convention & Visitors Bureau, current lodging and attraction conferences would be expanded to fulfill the additional role of introducing and informing area residents.

- 3.9 Action: Develop a Hospitality Institute where Housatonic Heritage may collaborate with educational institutions, non-profits, and economic development entities to create and dispense training courses on topics such as interacting with the public, appearance, and demeanor.** Hospitality training may be accompanied by certifications or other denotations of completion of course work.
- 3.10 Action: Create a bike-hike-paddle relationship with the health community to encourage use of parks to improve health and well-being.** Begin by reaching out to organizations and publications that stress the relationship between health and exercise.

### **5.3.4 Goal 4. Broaden Public Support for Heritage Resources.**

Key goals that have been identified through public scoping sessions include offering a range of activities that will require Housatonic Heritage to broaden public support for heritage resources. A robust stewardship program will provide for responsible planning and management of land, water, cultural, and historical resources for the benefit of today's and future generations. The emphasis will be on care of resources owned collectively and on proper oversight for long-term protection and enjoyment by all. Hands-on education, community support, and inclusion of children are essential to building a network of stewards for the long-term preservation of what is prized in the region.

- 4.1 Action: Broker internships for area college and graduate students that meet academic requirements and help Housatonic Heritage and other organizations reach their goals.** Devise a sustainable training and maintenance plan that allows for adequate summer

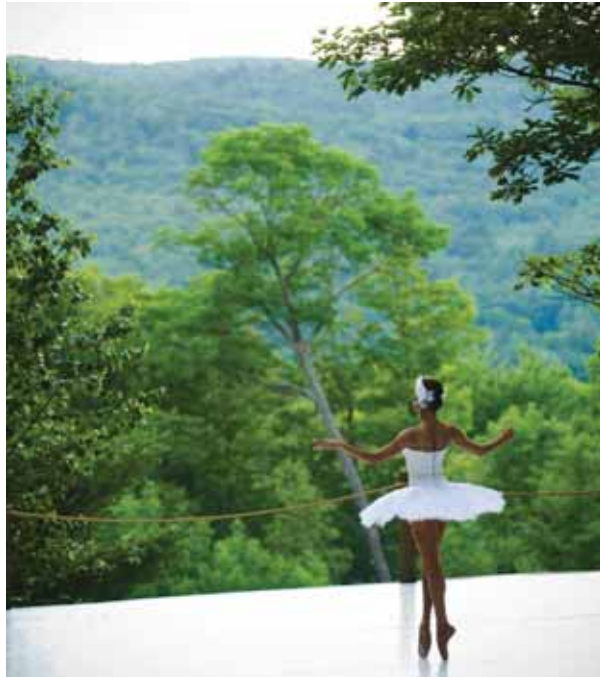
## Chapter 5: Implementation Plan & Policies *continued*

housing for staff leaders, training room, and tool storage.

**4.2 Action: Promote the “Greenagers” model as a way to engage youth in resource preservation. With the twin goals of service and stewardship, Greenagers is a Berkshires-based program that teaches teenagers about environmental issues while they learn work skills by building a riverwalk or distributing local farm produce.** Because the abundance of youth energy has not been harnessed in the region, Housatonic Heritage will encourage Greenagers to expand regionally and consider tying into schools’ community service requirements. In preparation, Housatonic Heritage will explore plans for an NPS-sponsored Youth Summit which will investigate engaging youth in heritage activities.

**4.3 Action: Increase the effectiveness of the UHVE course for teachers by conducting a thorough self-evaluation.** Consider adding a second or third field course as an independent study option leading to the preparation of classroom materials and to the establishment of the arts in the curriculum. Increase post-program participation with natural and heritage sites in the region. Determine how to use teachers’ skills to advise on links to the schools, program development at the sites, and act as the ambassadors for an initiative to incorporate heritage education from the region around them into the schools. Consider developing mentoring relationships with naturalists and historians as “classroom scholars.”

**4.4 Action: Develop classroom materials and experiences that will supplement, enhance, and be compatible with existing state required curricula.** Develop virtual field trips, A Paper Mill in a Box traveling kit, organize interactive video conferencing between classroom and heritage sites, and other interactive media to supplement lesson plans in a format that students find fun and engaging. In the long term, student involvement will lead to stewardship. Start by making a complete



*Jacob's Pillow*

inventory of all current and past arts and history organization school-based programs.

**4.5 Action: The History Alliance will begin to explore innovative ways to engage the next generation by: creating intellectual links between history and the environment; sponsoring workshops on programming and marketing to reach younger community members; developing projects that bring school groups to heritage sites; and designing publications specifically geared to youth and young children.**

**4.6 Action: Develop artist and writers’ residencies in the classroom that build on the successful pilot with Herman Melville’s Arrowhead and the Pittsfield Public Schools.** Commission a multi-site specific work based on the historical and environmental heritage of the region to be presented by local artists and students.

**4.7 Action: Investigate working with physical education teachers to get students onto trails.** The Appalachian Trail’s student and teacher training program “A Trail to Every Classroom” is a potential model for school programming.

## Chapter 5: Implementation Plan & Policies *continued*

- 4.8 Action:** Establish a youth advisory board to help Housatonic Heritage think and plan holistically and realistically to engage children in heritage education and work.
- 4.9 Action:** Establish a ten-year goal to require that all children in the region by age 13 will have been on the river, hiked a half dozen trails, visited five or more historic sites, attended several performances, made paper by hand, and worked a half dozen hours to preserve the region's heritage. Begin the conversation with partners and local schools to determine how to make this goal realistic.



*Sheffield Historical Walk, 2010.  
Sheffield, MA.*

### **5.3.5 Goal 5. Preserve Heritage Resources.**

Much work is being done on the municipal level for land conservation, and Housatonic Heritage is engaging with the Sheffield Land Trust, the Berkshire Natural Resource Commission, and others organizations to: envision next steps toward conservation of existing resources, open spaces, view sheds, and wildlife habitat; restore lands to productivity; and create an economically viable future for farming and other responsible uses of our lands. A similar effort needs to be expended to support preservation of historical resources. Because the spokespersons for historical resources tend to be locally based and locally concerned, Housatonic Heritage can assert itself as the organization that spearheads a regional emphasis on preservation and shared resources.

- 5.1 Action:** Housatonic Heritage's greatest contribution will be the application of regional thinking to local processes of building and landscape preservation. Housatonic Heritage will offer the opportunity for local preservationists to think about economies of scale, regional style, regional preservation, and collaborative projects that span town and state lines.
- 5.2 Action:** Create a partnership with the UMass-Hancock Shaker Village graduate program in historic preservation to conduct baseline surveys. With their expertise, Housatonic Heritage will contract with preservation experts to conduct historic

architecture surveys and inventories of notable structures, including barns and other outbuildings. Review and update the inventories to make recommendations to executive director for program directions.

- 5.3 Action:** Become a catalyst for national register status, landmark or historic districts, and for the compiling of inventories of historic structures within towns. After a number of inventories are complete, convene meetings about findings that will lead to ways to work together to establish priorities for preservation. Provide emergency funding and the necessary staff effort to prepare for survey research and applications leading to government status, such as national register, local historic district, or landmark status. Write an RFP for a barn and outbuilding survey in MA modeled after the work done in CT.
- 5.4 Action:** Advocate for preservation by taking action on recommendations, writing letters of support, speaking with government officials at the local, state, and federal levels, and brokering partnerships between regulatory bodies.
- 5.5 Action:** Encourage every small museum to develop a preservation plan for its own institution which includes inventorying collection and defining plans for artifact storage, research, conservation, and interpretation.





*Built in 1907, this architectural gem in Lee, MA, is the only remaining Carnegie Library in the Berkshires.*

The History Alliance Advisory Group considers collections care and storage its priority to find solutions for securing the stability of local history collections. Continue the Collections Care “Rounds” program and working with larger strategic partners, such as the Connecticut League of History Organizations, Mass Humanities, New England Museum Association and Preservation Mass, the History Alliance will help to ensure that the small groups know about state-of-the-art solutions.

- 5.6. Action: Conduct an inventory of archival materials and devise a preservation plan (which may include scanning) for materials that are currently part of private collections, libraries, and the Crane Museum.** Assess the possibility of grants for a cluster of organizations.
- 5.7 Action: Conduct a feasibility study for the regional collections storage facility. Determine if there is a shared desire to create a shared storage facility for artifacts belonging to small historical societies and**

**museums.** Climate controlled and secure, the space may be designed to incorporate a work area that could be used for inventorying and/or staging for exhibitions and an area where conversation treatments could take place.

- 5.8. Action: Assist municipalities to achieve Certified Local Government status which would allow local governments to strengthen their local preservation efforts** by providing municipalities with valuable technical assistance and small matching grants and allowing them to participate more formally in federal and state historic preservation programs.
- 5.9 Action: Explore innovative ways to engage the next generation, including: creating intellectual links between history and the environment;** workshops on programming and marketing to reach younger community members; projects that bring school groups to heritage sites; and publications specifically geared to youth.
- 5.10 Action: Work with the Beckley Furnace board to make its vault room functional for the storage of archival materials, with**



*The Housatonic Riverwalk in Great Barrington, MA, is a National Recreation Trail.*

temperature and humidity control and proper furnishings.

**5.11 Action: Establish a paid internship program** with UMass Public History program, Union College Public History program, or Cooperstown Graduate Program in museum studies. Devise a rotating summer internship and support a house that interns could live in for short term.

### **5.4 Funding for Housatonic Heritage Activities**

To fund the strategies and activities listed above, the Housatonic Heritage Development Committee will focus on this list of potential funders. Some have supported Housatonic Heritage in the past and would be likely sources of funding for new projects.

### **5.5 Implementation Plan: Organizational Strategies**

To be successful at the Actions listed above, Housatonic Heritage plans to add new strategies at the organizational level to ensure that the

organization's operations will support the new efforts. They are:

**1. Host Annual Idea Exchanges.** Beginning in 2013, Housatonic Heritage will convene three annual gatherings of partners and potential partners, experts in the field, including representatives of government agencies, education and nonprofit groups, and business. Each group will be convened around a theme: natural resources; cultural resources; and historical resources. While Housatonic Heritage meetings, conferences, and information sessions include representatives of organizations from both states, these gatherings will be called specifically to address the challenges and possibilities for cross-state collaboration and/or information sharing.

The purpose is, first, to discuss topics of mutual interest, initiate collaboration and information sharing among entities working in Connecticut and Massachusetts and, second, to find ways (large and small) that Housatonic Heritage can be involved to

## Chapter 5: Implementation Plan & Policies *continued*

**Table 3: Potential Funders for a Sample of 13 Action Items**

Action Item No.	Action Item	Potential Funder
1.1	Develop a consumer profile for cultural organizations	Berkshire Taconic Community Foundation
1.4	Expand heritage walks from two to four weeks to draw more visitors and to engage a new audience, younger children with their families and youth.	Mass Humanities Community Foundation of Northwest CT
3.6	Link heritage topics with today's issues	
1.5	For bike, hike, and paddle trails, install parking areas, kiosks, and wayfinding markers.	Federal Highway Administration Recreational Trails Grant Program
1.6	Engineer and design a dedicated walking and biking trail in Cornwall, CT, that is part of family-friendly network.	Connecticut Office of Culture & Tourism
3.1	Complete the network of hiking, biking, and walking trails	
2.1	Tie themes and heritage-related organizations together by building on the trail concept to link historic properties.	National Endowment for the Humanities
2.7	Develop and support secondary African American trail sites	Friends of W.E.B. Du Bois Library National Trust for Historic Preservation
3.4	Create a paddling guide with online companion	Berkshire Bank Foundation
4.6	Artists and Writers Residencies in Classroom	Massachusetts Cultural Council
5.5	Encourage small museums to develop a preservation plan	National Institute for Conservation Assessment Program
5.6	Conduct and inventory or archival material.	National Archives Digital Commonwealth
5.7	Conduct a feasibility study for the regional collections storage facility	Institute of Museums & Library Services



## Chapter 5: Implementation Plan & Policies *continued*



With her novel *New England Tales* (1822) set in the Berkshires, Catharine Maria Sedgwick of Stockbridge was the first to attract visitors to the scenic charm of the region. A sample of her handwriting, courtesy of the Massachusetts Historical Society.

ensure that it is serving the needs of the region. An additional purpose is to identify at-risk resources. With timely notification, the chances are greater that the resources can be preserved.

**2. Ensure Excellent Board of Trustees and Overseers.** Revise organizational bylaws to ensure that the structure of the Board is such that it is comprised of people with expertise who are active and representative of regional heritage interests, not advocates of one special interest over another. Since the managers of the regional planning organizations (Berkshire Regional Planning Council in Massachusetts and Northwestern Connecticut Council of Governments in Connecticut) have extensive knowledge of municipal planning issues and policies, they will be asked to have permanent positions on the Council of Overseers.

**3. Over the next five years, add staff in the areas of development staff and education** for annual appeal and grants writing. Expand the role of education coordinator to link programs with sites. Reach out to other heritage areas to learn from their experiences particularly in how their management and fundraising functions work.

**4. Use media and social media more effectively.** Make the website more user-friendly. Add an interactive map component to the website that would allow users to see historical landscapes, population changes, trail access, and changes in

river. Create “talk back” about programs. Establish a Facebook presence.

**5. Reach out to national organizations that have a vested interest in the region to bolster Housatonic Heritage activities.** Consider working with Boston Office of the National Trust for Historic Preservation which supports Chesterwood in Stockbridge, Boston-based Historic New England which manages Merwin House in Stockbridge, and the Smithsonian’s National Museum of African American History and Culture, opening in Washington, D.C., in 2015, which has strong interests in the life and work of Du Bois.

### 5.6 Conclusion

The vision, goals, interpretive themes, actions, and strategies described in this plan are intended to be a blueprint for the advancement of Housatonic Heritage in meaningful, memorable, and measurable ways. The work ahead is characterized by partnership and shared goals with nearly two dozen key partners in the diverse disciplines of planning, tourism, history, culture, natural resources, recreation, education, and government. With Housatonic Heritage acting alternately as leader, supporter, catalyst, gatherer of talent, and convener of concerned citizens, the heritage area, and the region in general, is headed toward a vibrant future where the shared heritage is preserved and enjoyed so that it enriches the quality of life for all.

# Chapter 5: Implementation Plan & Policies *continued*

Action Ref #	Action	Short - 1 to 3 Years			Mid - 3 to 4 Years			Long - 5 to 10 years			Project Type		Project Partners	Project Cost (2012\$)	Funding Sources	Desired Outcome/ Measurable Results	UHVNHA Goal Category
									UHVNHA In-House	Collaboration							
1.1	Develop a consumer profile for cultural organizations.	X				X						Western Ct Convention & Visitors Bureau AND Berkshire	Staff Time, Project Costs TBD	UHVNHA Dedicated Funding	Increase knowledge of consumers and improve attendance at venues and events	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.2	Take an active role in devising solutions to the problems of local food and agriculture, conservation, and recreation and historic preservation.		X										Staff Time		Increase sustainable land use practices and improve open space preservation	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.3	Seek relevance for the Paper Trail to the current industry in addition to developing programs and increasing knowledge of the past.	X				X						Crane & Company, Lee Community Development Commission, Berkshire Museum	Staff Time, Project Costs TBD, Interpretive materials TBD	UHVNHA Program Funding	Increase knowledge of paper heritage and increase visitation to heritage sites	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.4	Expand Heritage Walks duration from two to four weeks to draw more visitors to the region and to engage a new audience, younger children with their families and youth.	X											Staff Time, program expansion \$25,000	UHVNHA Program Funding	Increase visitors and residents grasp of our heritage and increase support for heritage stewardship	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.5	For bike, hike, and paddle trails, design and install parking areas, kiosks, and wayfinding markers at strategic trailheads.			X		X						Northwest CT Planning Collaborative, Berkshire Regional Planning Commission	Staff Time, program costs TBD	UHVNHA Program Funding	Improve interpretation and basic wayfinding, increase use of trails	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.6	Engineer and design a dedicated walking and biking trail in Cornwall, CT, that is part of a family-friendly network of off-road recreational trails that connect village centers with each other, with schools, and with state park wilderness areas.				X	X						Housatonic Valley Association, CT Dept. of Energy and Environmental Protection, Town of Cornwall (CT), Cornwall EDC	Staff Time, Project Costs TBD, Engineering and Design of Phase 1 \$134,000	National Recreational Trails grant, UHVNHA dedicated funding	Make the regional trail program safer, provide access to additional heritage resources, improve trail access for children & families	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.7	Explore the feasibility of creating a home base with living facilities, training room, storage space for tools for summer interns who come to work in historic or natural sites.		X			X						Appalachian Mountain Club (CT & MA), Great Barrington Trails & Greenways (LMA), MA Dept. of Conservation & Recreation	Staff Time, long-term lease, retrofit, equipment \$48,000		Improve internship opportunities, retain experienced crew, improve trail network	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
1.8	Increase the maximum grant funding level to \$10,000 to allow for larger projects.	X											Staff Time, program expansion \$50,000	UHVNHA Program Funding	Increase the amount of funds leveraged and the size and scope of heritage preservation projects	Bolster Economic Vitality by Integrating Stewardship and Economic Development	
2.1	Tie themes and heritage-related organizations together by building on the trail concept to link historic properties.	X											Staff Time		Increase knowledge and access to heritage sites, increase trail usage	Foster Residents' and Visitors' knowledge of the UHV and its Heritage	
2.2	Schedule National Park Service interpretive planning specialists to deliver training workshops at Housatonic Heritage in how to create comprehensive interpretive themes that inter-relate sites.	X											Staff Time		Increase heritage partner's knowledge and skills, and build upon / create new cooperative interpretive programs	Foster Residents' and Visitors' knowledge of the UHV and its Heritage	

# Chapter 5: Implementation Plan & Policies *continued*

Action Ref #	Action	Short - 1 to 3 Years			Mid - 3 to 4 Years		Long - 5 to 10 Years		Project Type		Project Partners	Project Cost (2012\$)	Funding Sources	Desired Outcome/Measurable Results	UHVNHA Goal Category
								UHVNHA In-House	Collaboration						
2.3	Initiate cultural festivals to create efficient virtual and physical exposure such as "open house" days, all on the same day, to focus visitors' attention and to immerse themselves in the abundant offerings near where they live and work.										1Berkshire (Berkshire Creative & Berkshire Visitors Bureau), Western CT Convention & Visitors Bureau, Berkshire Chamber of Commerce, So. Berkshire Chamber of Commerce	Staff Time, promotion, space rental, services for 5 years \$43,000	UHVNHA Program Funding	Increase residents and visitors grasp of our heritage and increase visitation to and appreciation of our heritage sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.4	Package podcasts to increase exposure of small heritage and cultural organizations.											Program cost - 5 years \$59,000		Increase residents and visitors grasp of our heritage and increase visitation to and appreciation of our heritage sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.5	Help sites make conversions and package smartphone tours, podcasts, and other digital media.											Staff Time		Increase residents and visitors grasp of our heritage and increase visitation to and appreciation of our heritage sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.6	Research and the develop print/web/multimedia materials to communicate why this region has shaped our cultural life here today.											Staff Time, Project Costs TBD		Increase residents and visitors grasp of our heritage and increase visitation to and appreciation of our heritage sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.7	Develop and support secondary African American trail sites such as: NAACP leader James Weldon Johnson's writing cottage in Great Barrington; Wizard's Glen in Dalton where a cluster of a dozen cabins housed a small community of African Americans (a cave beneath the road was possibly an Underground Railroad site); and the Hoose House in Dalton which is one of the last surviving houses of that Black community, now on the National Register of Historic Places.										UMass Amherst, Friends of Dubois Homestead, Mass College of Liberal Arts, Williams College, City of Pittsfield Cultural Development Office, The Trustees of Reservations	Staff time, research of Dubois Homestead, assistant, program costs TBD	UHVNHA Program Funding	Increase interpretive projects within the African American Heritage Trail, expand preservation project and increase visitation to trail sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.8	Support the ten-year goal of the Du Bois National Historic Site as it seeks \$10 million to create a national destination for learning about the life and legacy of Du Bois.										Du Bois National Historic Site	Staff Time	UHVNHA Dedicated Funding	Increase interpretive projects within the African American Heritage Trail, expand preservation project and increase visitation to trail sites	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
2.9	Convene interpretive programmers in the region and charge them with developing a comprehensive interpretive plan that will enhance and reinforce the messages of Housatonic Heritage.										All Sites	Staff Time		A heritage area-wide interpretive plan is in use	Foster Residents' and Visitors' Knowledge of the UHV and its Heritage
3.1	Complete the network of hiking, biking, and walking trails and promote them both as destinations and as pathways for personal transportation.										Berkshire Regional Planning Commission / Berkshire Bikeway Council, Northwest CT Planning Collaborative, Northwestern CT Council of Governments		UHVNHA Program Funding	Make the regional trail program safer, provide access to additional heritage resources, improve trail access for children & families	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit



# Chapter 5: Implementation Plan & Policies *continued*

Action Ref #	Action	Short - 1 to 3 Years			Mid - 3 to 4 Years			Long - 5 to 10 years			Project Type		Project Partners	Project Cost (2012\$)	Funding Sources	Desired Outcome/ Measurable Results	UHVNHA Goal Category
		Years	Years	Years	Years	Years	Years	UHVNHA In-House	Collaboration								
3.3	Create a web-based central portal for all trails and river access to consist of a central data base on location, parking, access points, and landmarks.		X								X					Make the regional trail program safer, provide access to additional heritage resources, improve trail access for children & families	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
3.4	Create paddling guide with online companion that is smartphone enabled and has downloadable PDF's.		X								X		Housatonic Valley Association			Increase knowledge of the regional water trails, provide access to additional heritage resources, improve trail access & increase visitors to the waterways	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
3.5	Create an Accessible Trail guide that lists all of the wheelchair accessible trails in the heritage area, including a half-mile loops at Lake Mansfield and at Pleasant Valley in Lenox.		X								X					Make the regional trail program safer, provide access to additional heritage resources, improve trail access for disabled persons	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
3.6	Link heritage topics with today's issues, such as bio-fuels, locavore practices, enviro-startups and support economic activities like farming and clean water that help maintain the pastoral landscape.		X								X			Staff Time		Increase sustainable land-use practices and improve open space preservation	UHV as an Enriching Place to Live, Work, and Visit
3.7	Emphasize preservation of a viable rural economy by helping to safeguard productive working landscapes.		X								X			Staff Time		Increase sustainable land-use practices and improve open space preservation	UHV as an Enriching Place to Live, Work, and Visit
3.8	Sponsor public heritage fairs' to provide residents with a wide array of information about regional offerings.				X						X					Increase residents and visitors grasp of our heritage and increase visitation to and appreciation of our heritage sites	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
3.9	Develop a Hospitality Institute where Housatonic Heritage may collaborate with educational institutions, non-profits, and economic development entities to create and disperse training courses on topics such as interacting with the public, appearance, and demeanor.						X				X		Berkshire (Berkshire Creative & Berkshire Visitors Bureau), Western CT Convention & Visitors Bureau, Berkshire Chamber of Commerce, So. Berkshire Chamber of Commerce			Improve the labor pool's grasp of our heritage so that this knowledge can be communicated to visitors. Increase appreciation for our heritage and visitation to heritage sites, support for preservation initiatives	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
3.10	Create a bike-hike-paddle relationship with the health community to encourage use of parks to improve health and well-being.		X								X			Staff Time	UHVNHA Program Funding	Make the regional trail program safer, provide access to additional heritage resources, improve trail access for disabled persons	Enrich the Experience of the UHV as an Enriching Place to Live, Work, and Visit
4.1	Broker internships for area college and graduate students that meet academic requirements and help Housatonic Heritage and other organizations reach their goals.		X								X		Berkshire Community College, UConn Torrington, Northwest CT Community College, Mass College of Liberal Arts	Staff Time		Engage students to broaden their understanding and appreciation for our heritage. Utilize their skills to benefit preservation / conservation efforts	Broaden Public Support for Heritage Resources

# Chapter 5: Implementation Plan & Policies *continued*

Action Ref #	Action	Project Type			Project Partners	Project Cost (2012\$)	Funding Sources	Desired Outcome/ Measurable Results	UHVNHA Goal Category	
		Short - 1 to 3 Years	Mid - 3 to 4 Years	Long - 5 to 10 years In-House						
4.2	Promote the "Greenagers" model as a way to engage youth in resource preservation.	X				X	Staff Time	Engage students to broaden their understanding and appreciation for our heritage. Utilize their skills to benefit preservation / conservation efforts	Broaden Public Support for Heritage Resources	
4.3	Increase the effectiveness of the UHVE course for teachers by conducting a thorough self-analysis evaluation.	X				X	Staff Time	Improve teacher's grasp of our heritage, build local heritage curricula, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
4.4	Develop classroom materials and experiences that will supplement, enhance, and be compatible with existing state required curricula.	X				X	Staff Time, Project Costs TBD	Improve teacher's grasp of our heritage, build local heritage curricula, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
4.5	The History Alliance will begin to explore the next generation by: creating intellectual links between history and the environment; sponsoring workshops on programming and marketing to reach younger community members; developing projects that bring school groups to heritage sites; and designing publications specifically geared to youth and young children.	X			X	History Alliance members	Staff Time	Improve teacher's grasp of our heritage, build local heritage curricula, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
4.6	Develop artist and writers' residencies in the classroom that build on the successful pilot with Hernan Melville's Arrowhead and the Pittsfield Public Schools.	X			X	Pittsfield Public Schools, City of Pittsfield Office of Cultural Development, Arrowhead / Berkshire Historical Society	Staff Time, program expansion \$36,000	UHVNHA Program Funding	Improve teacher's grasp of our heritage, build local heritage curricula, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources
4.7	Investigate working with physical education teachers to get students onto trails.	X				X	Staff Time	Improve student's grasp of our heritage, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
4.8	Establish a youth advisory board to help Housatonic Heritage think and plan holistically and realistically to engage children in heritage education and work.	X				X	Staff Time, program costs TBD	Improve student's grasp of our heritage, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
4.9	Establish a ten-year goal to required that all children in the region by age 13 will have been on the river, hiked a half dozen trails, visited five or more historic sites, attended several performances, made paper by hand, and worked a half dozen hours to preserve the region's heritage.			X		X	Staff Time, program costs TBD	Improve student's grasp of our heritage, increase stewardship for heritage resources in our students	Broaden Public Support for Heritage Resources	
5.1	Housatonic Heritage's greatest contribution will be the application of regional thinking to local processes of building and landscape preservation.	X				X	Staff Time	Increase sustainable land use practices and improve open space preservation	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.2	Create a partnership with the UMass-Hancock Shaker Village graduate program in historic preservation to conduct baseline surveys.	X			X	UMass Amherst, Hancock Shaker Village	Staff Time	Improve student's grasp of our heritage, increase stewardship for heritage resources in our students, create a resource for preservation / conservation efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	

# Chapter 5: Implementation Plan & Policies *continued*

Action Ref #	Action	Short - 1 to 3 Years			Mid - 3 to 4 Years			Long - 5 to 10 years			Project Type		Project Partners	Project Cost (2012\$)	Funding Sources	Desired Outcome/ Measurable Results	UHVNHA Goal Category
									UHVNHA	Collaboration	In-House						
5.3	Become a catalyst for national register status, landmark or historic districts, and for the compiling of inventories of historic structures within towns.	X										X	Staff time, writing/ research assistant, costs TBD		Increase residents' grasp of our heritage, increase municipal support for preservation	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.4	Advocate for preservation by taking action on recommendations, writing letters of support, speaking with government officials at the local, state and federal levels, and brokering partnerships between regulatory bodies.	X										X	Staff Time		Increase residents' grasp of our heritage, increase state and municipal support for preservation, achieve new state/ local regulations	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.5	Encourage small museums to develop a preservation plan for its own institution which includes inventorying collection and defining plans for artifact storage, research, conservation, and interpretation.	X										X	New England Museum Association  Staff Time, Contractual services with NEMA (\$8,000)		Develop increased capacity within preservation/ conservation organizations, increase the level of their efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.6	Conduct an inventory of archival materials and devise a preservation plan (which may include scanning) for materials that are currently part of private collections, libraries and the Crane Museum.		X									X	Staff Time	UHVNHA Dedicated Funding	Develop increased capacity within preservation/ conservation organizations, increase the level of their efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.7	Conduct a feasibility study for the regional collections storage facility.		X									X	Staff Time, Contractual services with consultant (\$5,500)	UHVNHA Dedicated Funding	Develop increased capacity within preservation/ conservation organizations, increase the level of their efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.8	Assist municipalities to achieve Certified Local Government status which would allow local governments to strengthen their local preservation efforts by providing municipalities with valuable technical assistance and small matching grants and allowing them to participate more formally in federal and state historic preservation programs.		X									X	Staff Time		Improve knowledge of the value of conservation / preservation, assist in achieving 100% participation	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.9	Explore innovative ways to engage the next generation, including: creating intellectual links between history and the environment; workshops on programming and marketing to reach younger community members; projects that bring school groups to heritage sites; and publications specifically geared to youth.	X										X	Staff Time		Improve student's grasp of our heritage, increase stewardship for heritage resources in our students, create a resource for preservation / conservation efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	
5.10	Work with the Beckley Furnace board to make its vault room functional for the storage of archival materials, with temperature and humidity control and proper furnishings.		X									X	Friends of Beckley Furnace, CT Dept. of Energy and Environmental Protection  Staff Time, engineering & planning \$18,000		Develop increased capacity within preservation/ conservation organizations, increase the level of their efforts	Preserve Historical, Natural, and Cultural Resources in the Heritage Area	



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## APPENDIX 1: ENABLING LEGISLATION

### Public Law 109-338    Oct. 12, 2006

#### 109th Congress

#### Subtitle F—Upper Housatonic Valley National Heritage Area

##### SEC. 271. SHORT TITLE.

This subtitle may be cited as the “Upper Housatonic Valley National Heritage Area Act”.

##### SEC. 272. FINDINGS AND PURPOSES.

(a) FINDINGS.—Congress finds the following:

- (1) The upper Housatonic Valley, encompassing 29 towns in the hilly terrain of western Massachusetts and northwestern Connecticut, is a singular geographical and cultural region that has made significant national contributions through its literary, artistic, musical, and architectural achievements, its iron, paper, and electrical equipment industries, and its scenic beautification and environmental conservation efforts.
- (2) The upper Housatonic Valley has 139 properties and historic districts listed on the National Register of Historic Places, including—
  - (A) five National Historic Landmarks—
    - (i) Edith Wharton’s home, The Mount, Lenox, Massachusetts;
    - (ii) Herman Melville’s home, Arrowhead, Pittsfield, Massachusetts;
    - (iii) W.E.B. DuBois’ Boyhood Homesite, Great Barrington, Massachusetts;
    - (iv) Mission House, Stockbridge, Massachusetts; and
    - (v) Crane and Company Old Stone Mill Rag Room, Dalton, Massachusetts; and
  - (B) four National Natural Landmarks—
    - (i) Bartholomew’s Cobble, Sheffield, Massachusetts, and Salisbury, Connecticut;
    - (ii) Beckley Bog, Norfolk, Connecticut;
    - (iii) Bingham Bog, Salisbury, Connecticut; and
    - (iv) Cathedral Pines, Cornwall, Connecticut.

- (3) Writers, artists, musicians, and vacationers have visited the region for more than 150 years to enjoy its scenic wonders, making it one of the country’s leading cultural resorts.
  - (4) The upper Housatonic Valley has made significant national cultural contributions through such writers as Herman Melville, Nathaniel Hawthorne, Edith Wharton, and W.E.B. DuBois, artists Daniel Chester French and Norman Rockwell, and the performing arts centers of Tanglewood, Music Mountain, Norfolk (Connecticut) Chamber Music Festival, Jacob’s Pillow, and Shakespeare & Company.
  - (5) The upper Housatonic Valley is noted for its pioneering achievements in the iron, paper, and electrical generation industries and has cultural resources to interpret those industries.
  - (6) The region became a national leader in scenic beautification and environmental conservation efforts following the era of industrialization and deforestation and maintains a fabric of significant conservation areas including the meandering Housatonic River.
  - (7) Important historical events related to the American Revolution, Shays’ Rebellion, and early civil rights took place in the upper Housatonic Valley.
  - (8) The region had an American Indian presence going back 10,000 years and Mohicans had a formative role in contact with Europeans during the seventeenth and eighteenth centuries.
  - (9) The Upper Housatonic Valley National Heritage Area has been proposed in order to heighten appreciation of the region, preserve its natural and historical resources, and improve the quality of life and economy of the area.
- (b) PURPOSES.—The purposes of this subtitle are as follows:
- (1) To establish the Upper Housatonic Valley National Heritage Area in the State of Connecticut and the Commonwealth of Massachusetts.
  - (2) To implement the national heritage area alternative as described in the document entitled

## APPENDIX 1: ENABLING LEGISLATION *continued*

“Upper Housatonic Valley National Heritage Area Feasibility Study, 2003”.

- (3) To provide a management framework to foster a close working relationship with all levels of government, the private sector, and the local communities in the upper Housatonic Valley region to conserve the region’s heritage while continuing to pursue compatible economic opportunities.
- (4) To assist communities, organizations, and citizens in the State of Connecticut and the Commonwealth of Massachusetts in identifying, preserving, interpreting, and developing the historical, cultural, scenic, and natural resources of the region for the educational and inspirational benefit of current and future generations.

### SEC. 273. DEFINITIONS.

In this subtitle:

- (1) **HERITAGE AREA.**—The term “Heritage Area” means the Upper Housatonic Valley National Heritage Area, established in section 274.
- (2) **MANAGEMENT ENTITY.**—The term “Management Entity” means the management entity for the Heritage Area designated by section 274(d).
- (3) **Management Plan.**—The term “Management Plan” means the management plan for the Heritage Area specified in section 276.
- (4) **MAP.**—The term “map” means the map entitled “Boundary Map Upper Housatonic Valley National Heritage Area”, numbered P17/80,000, and dated February 2003.
- (5) **SECRETARY.**—The term “Secretary” means the Secretary of the Interior.
- (6) **STATE.**—The term “State” means the State of Connecticut and the Commonwealth of Massachusetts.

### SEC. 274. UPPER HOUSATONIC VALLEY NATIONAL HERITAGE AREA.

- (a) **ESTABLISHMENT.**—There is established the Upper Housatonic Valley National Heritage Area.
- (B) **BOUNDARIES.**—The Heritage Area shall be comprised of—

- (1) part of the Housatonic River’s watershed, which extends 60 miles from Lanesboro, Massachusetts to Kent, Connecticut;
- (2) the towns of Canaan, Colebrook, Cornwall, Kent, Norfolk, North Canaan, Salisbury, Sharon, and Warren in Connecticut; and
- (3) the towns of Alford, Becket, Dalton, Egremont, Great Barrington, Hancock, Hinsdale, Lanesboro, Lee, Lenox, Monterey, Mount Washington, New Marlboro, Pittsfield, Richmond, Sheffield, Stockbridge, Tyringham, Washington, and West Stockbridge in Massachusetts.
- (c) **AVAILABILITY OF MAP.**—The map shall be on file and available for public inspection in the appropriate offices of the National Park Service, Department of the Interior.
- (d) **MANAGEMENT ENTITY.**—The Upper Housatonic Valley National Heritage Area, Inc. shall be the management entity for the Heritage Area.

### SEC. 275. AUTHORITIES, PROHIBITIONS, AND DUTIES OF THE MANAGEMENT ENTITY.

(A) **DUTIES OF THE MANAGEMENT ENTITY.**—To further the purposes of the Heritage Area, the management entity shall—

- (1) prepare and submit a management plan for the Heritage Area to the Secretary in accordance with section 276;
- (2) assist units of local government, regional planning organizations, and nonprofit organizations in implementing the approved management plan by—

(A) carrying out programs and projects that recognize, protect and enhance important resource values within the Heritage Area;

(B) establishing and maintaining interpretive exhibits and programs within the Heritage Area;

(C) developing recreational and educational opportunities in the Heritage Area;

(D) increasing public awareness of and appreciation for natural, historical, scenic, and cultural resources of the Heritage Area;

## APPENDIX 1: ENABLING LEGISLATION *continued*

(E) protecting and restoring historic sites and buildings in the Heritage Area that are consistent with heritage area themes;

(F) ensuring that signs identifying points of public access and sites of interest are posted throughout the Heritage Area; and

(G) promoting a wide range of partnerships among governments, organizations and individuals to further the purposes of the Heritage Area;

- (3) consider the interests of diverse units of government, businesses, organizations and individuals in the Heritage Area in the preparation and implementation of the management plan;
- (4) conduct meetings open to the public at least semiannually regarding the development and implementation of the management plan;
- (5) submit an annual report to the Secretary for any fiscal year in which the management entity receives Federal funds under this subtitle, setting forth its accomplishments, expenses, and income, including grants to any other entities during the year for which the report is made;
- (6) make available for audit for any fiscal year in which it receives Federal funds under this subtitle, all information pertaining to the expenditure of such funds and any matching funds, and require in all agreements authorizing expenditures of Federal funds by other organizations, that the receiving organizations make available for such audit all records and other information pertaining to the expenditure of such funds; and
- (7) encourage by appropriate means economic development that is consistent with the purposes of the Heritage Area.

(B) **AUTHORITIES.**—The management entity may, for the purposes of preparing and implementing the management plan for the Heritage Area, use Federal funds made available through this subtitle to—

- (1) make grants to the State of Connecticut and the Commonwealth of Massachusetts, their

political subdivisions, nonprofit organizations and other persons;

- (2) enter into cooperative agreements with or provide technical assistance to the State of Connecticut and the Commonwealth of Massachusetts, their subdivisions, nonprofit organizations, and other interested parties;
- (3) hire and compensate staff, which shall include individuals with expertise in natural, cultural, and historical resources protection, and heritage programming;
- (4) obtain money or services from any source including any that are provided under any other Federal law or program;
- (5) contract for goods or services; and (6) undertake to be a catalyst for any other activity that furthers the purposes of the Heritage Area and is consistent with the approved management plan.

(C) **PROHIBITIONS ON THE ACQUISITION OF REAL PROPERTY.**—The management entity may not use Federal funds received under this subtitle to acquire real property, but may use any other source of funding, including other Federal funding outside this authority, intended for the acquisition of real property.

### **SEC. 276. MANAGEMENT PLAN.**

(A) **IN GENERAL.**—The management plan for the Heritage Area shall—

- (1) include comprehensive policies, strategies and recommendations for conservation, funding, management and development of the Heritage Area;
- (2) take into consideration existing State, county, and local plans in the development of the management plan and its implementation;
- (3) include a description of actions that governments, private organizations, and individuals have agreed to take to protect the natural, historical and cultural resources of the Heritage Area;
- (4) specify the existing and potential sources of funding to protect, manage, and develop the Heritage Area in the first 5 years of implementation;



## APPENDIX 1: ENABLING LEGISLATION *continued*

- (5) include an inventory of the natural, historical, cultural, educational, scenic, and recreational resources of the Heritage Area related to the themes of the Heritage Area that should be preserved, restored, managed, developed, or maintained;
  - (6) describe a program of implementation for the management plan including plans for resource protection, restoration, construction, and specific commitments for implementation that have been made by the management entity or any government, organization, or individual for the first 5 years of implementation; and
  - (7) include an interpretive plan for the Heritage Area.
- (B) DEADLINE AND TERMINATION OF FUNDING.—

- (1) DEADLINE.—The management entity shall submit the management plan to the Secretary for approval within 3 years after funds are made available for this subtitle.
- (2) TERMINATION OF FUNDING.—If the management plan is not submitted to the Secretary in accordance with this subsection, the management entity shall not qualify for Federal funding under this subtitle until such time as the management plan is submitted to the Secretary.

### SEC. 277. DUTIES AND AUTHORITIES OF THE SECRETARY.

(A) TECHNICAL AND FINANCIAL ASSISTANCE.—The Secretary may, upon the request of the management entity, provide technical assistance on a reimbursable or non-reimbursable basis and financial assistance to the Heritage Area to develop and implement the approved management plan. The Secretary is authorized to enter into cooperative agreements with the management entity and other public or private entities for this purpose. In assisting the Heritage Area, the Secretary shall give priority to actions that in general assist in—

- (1) conserving the significant natural, historical, cultural, and scenic resources of the Heritage Area; and
- (2) providing educational, interpretive, and

recreational opportunities consistent with the purposes of the Heritage Area.

#### (B) APPROVAL AND DISAPPROVAL OF MANAGEMENT PLAN.—

- (1) IN GENERAL.—The Secretary shall approve or disapprove the management plan not later than 90 days after receiving the management plan.
- (2) CRITERIA FOR APPROVAL.—In determining the approval of the management plan, the Secretary shall consider whether—

(A) the management entity is representative of the diverse interests of the Heritage Area, including governments, natural and historic resource protection organizations, educational institutions, businesses, and recreational organizations;

(B) the management entity has afforded adequate opportunity, including public hearings, for public and governmental involvement in the preparation of the management plan;

(C) the resource protection and interpretation strategies contained in the management plan, if implemented, would adequately protect the natural, historical, and cultural resources of the Heritage Area; and

(D) the management plan is supported by the appropriate State and local officials whose cooperation is needed to ensure the effective implementation of the State and local aspects of the management plan.

- (3) ACTION FOLLOWING DISAPPROVAL.—If the Secretary disapproves the management plan, the Secretary shall advise the management entity in writing of the reasons therefore and shall make recommendations for revisions to the management plan. The Secretary shall approve or disapprove a proposed revision within 60 days after the date it is submitted.
- (4) APPROVAL OF AMENDMENTS.—Substantial amendments to the management plan shall be reviewed by the Secretary and approved in the same manner as provided for the original management plan. The management entity shall not use Federal funds authorized by this

## APPENDIX 1: ENABLING LEGISLATION *continued*

subtitle to implement any amendments until the Secretary has approved the amendments.

### SEC. 278. DUTIES OF OTHER FEDERAL AGENCIES.

Any Federal agency conducting or supporting activities directly affecting the Heritage Area shall—

- (1) consult with the Secretary and the management entity with respect to such activities;
- (2) cooperate with the Secretary and the management entity in carrying out their duties under this subtitle and, to the maximum extent practicable, coordinate such activities with the carrying out of such duties; and
- (3) to the maximum extent practicable, conduct or support such activities in a manner which the management entity determines will not have an adverse effect on the Heritage Area.

### SEC. 279. REQUIREMENTS FOR INCLUSION OF PRIVATE PROPERTY.

(A) NOTIFICATION AND CONSENT OF PROPERTY OWNERS REQUIRED.—No privately owned property shall be preserved, conserved, or promoted by the management plan for the Heritage Area until the owner of that private property has been notified in writing by the management entity and has given written consent for such preservation, conservation, or promotion to the management entity.

(B) LANDOWNER WITHDRAW.—Any owner of private property included within the boundary of the Heritage Area shall have their property immediately removed from the boundary by submitting a written request to the management entity.

### SEC. 280. PRIVATE PROPERTY PROTECTION.

(A) ACCESS TO PRIVATE PROPERTY.—Nothing in this subtitle shall be construed to—

- (1) require any private property owner to allow public access (including Federal, State, or local government access) to such private property; or
  - (2) modify any provision of Federal, State, or local law with regard to public access to or use of private property.
- (b) LIABILITY.—Designation of the Heritage Area

shall not be considered to create any liability, or to have any effect on any liability under any other law, of any private property owner with respect to any persons injured on such private property.

(c) RECOGNITION OF AUTHORITY TO CONTROL LAND USE.—Nothing in this subtitle shall be construed to modify the authority of Federal, State, or local governments to regulate land use.

(d) PARTICIPATION OF PRIVATE PROPERTY OWNERS IN HERITAGE AREA.—Nothing in this subtitle shall be construed to require the owner of any private property located within the boundaries of the Heritage Area to participate in or be associated with the Heritage Area.

(e) EFFECT OF ESTABLISHMENT.—The boundaries designated for the Heritage Area represent the area within which Federal funds appropriated for the purpose of this subtitle may be expended. The establishment of the Heritage Area and its boundaries shall not be construed to provide any nonexistent regulatory authority on land use within the Heritage Area or its viewshed by the Secretary, the National Park Service, or the management entity.

### SEC. 280A. AUTHORIZATION OF APPROPRIATIONS.

(a) IN GENERAL.—There is authorized to be appropriated for the purposes of this subtitle not more than \$1,000,000 for any fiscal year. Not more than a total of \$10,000,000 may be appropriated for the Heritage Area under this subtitle.

(b) MATCHING FUNDS.—Federal funding provided under this subtitle may not exceed 50 percent of the total cost of any assistance or grant provided or authorized under this subtitle.

### SEC. 280B. SUNSET.

The authority of the Secretary to provide assistance under this subtitle shall terminate on the day occurring 15 years after the date of the enactment of this subtitle.

## APPENDIX 2

### Chronology of the National Heritage Area Designation

The UHVNHA grew out of the collaboration of several grassroots organizations whose members concluded that: 1) the stories they wanted to tell extended beyond their individual sites to the region as a whole; and 2) their shared purposes could more readily be accomplished if they worked together. Many organizations had worked in partnership for more than a decade before UHVNHA was officially established.

- In **1994** the membership of the Salisbury (CT) Association, dedicated to preserving and improving the beauty of Salisbury and environs, established the Tri-Corners History Council as a forum for historical societies in northwest Connecticut, southwest Massachusetts, and adjoining communities in New York State, to foster a **regional identity** by sharing ideas and coordinating historical and cultural activities.
- In **1998**, the Tri-Corners History Council erected educational signs at historic sites and initiated an Iron Heritage Trail that identified over 100 iron industry sites in the tri-state region and published a trail map. (While the New York communities are part of the same geographic region at UHVNHA, they are located within the Hudson River Valley National Heritage Area which covers areas only within New York State.) Members thought that the region might be a suitable Heritage Area and approached their legislators to have the area studied.
- **2000:** The Upper Housatonic Valley National Heritage Area, Inc. was incorporated as a private not-for-profit organization to pursue designation as a national heritage area. Its active board and broad enthusiastic membership included the region's municipalities and cultural, historical, environmental, civic, educational, and economic development organizations. Its first goal was to assist the National Park Service with the feasibility study and to begin developing heritage activities and establishing partnerships that demonstrated the organization's commitment to becoming a heritage area. Financial support during this period was received the Salisbury Association, Friends of Beckley and donors throughout the region.
- On **November 9, 2000**, Public Law 106-470 directed the Secretary of the Interior to conduct a study of the suitability and feasibility of establishing the UHVNHA in Connecticut and Massachusetts. The study period began.
- In **2002**, the National Park Service's northeast Regional Office completed the feasibility study and concluded that "the Upper Housatonic Valley exhibits all the criteria for establishing a national heritage area, including the representation of important national themes and that the designation would give rise to "partnerships that can enhance the region's quality of life." The environmental assessment component of the report found that potential associated impacts in the development of the heritage area would not be detrimental to significant resources and that additional visitors would benefit the local tourism economy. During the feasibility study period, the UHNVHA, Inc. implemented programs, including guided walks, special events, a course for teachers on the region's history, and established interpretive trails.
- In **2004** a preliminary Management Action Plan was prepared, numerous public meetings and presentations followed and the Trustees held day-long retreats in 2004, 2006, and 2007 that resulted in the mission and vision statements as well as plans for achieving organizational goals. The first "Heritage Partnership Theme & Activity Committees" were established, setting the stage for the current implementation plan.
- On **October 12, 2006**, after almost three years of study, Public Law 109-338 officially established the Upper Housatonic Valley National Heritage Area. The legislation is in Appendix 1.
- **2011:** UHVNHA, Inc. is governed by a thirteen-member Board of Trustees. A Board of Overseers meets less frequently to provide an overview of activities, goal-setting, and organizational structure. An executive director manages the organization and its activities day-to-day with the assistance of temporary part-time staff.
- **2012:** Management Report Completed.



# Upper Housatonic Valley National Heritage Area Interpretive Theme Matrix

<p><b>Creating a Cultural Center</b></p> <p><b>The power of nature to rejuvenate and inspire led the Upper Housatonic Valley to become a nationally recognized center for the literary, visual, and performing arts. Independent-minded artists at the forefront of their fields found homes among the scenic landscape, opportunity for experimentation, and sophisticated audiences for their works.</b></p> <p>Theme #1</p>	
Concepts and Ideas	Topics and Stories
<ul style="list-style-type: none"> <li>• Describe how this reinvention of the economic base generated new sectors of economic activity that emphasized the area’s natural beauty and a place for recreation, relaxation, and inspiration.</li> <li>• Explore and discuss the Upper Housatonic Valley’s contributions to and impact on American art and artists, the American identity, and national consciousness. Explore the history and artistry of the artists of the Upper Housatonic Valley. Put each into context and include notable works and performances</li> <li>• List notable artists who made their homes (full or part time) in the Upper Housatonic Valley who had significant impact on American art and culture, such as Herman Melville, Edith Wharton, Nathaniel Hawthorne, and Norman Rockwell. Describe why they were drawn to the area.</li> <li>• Explain the role of the Gilded Age cottage dwellers in creating an artistic hub as well as other forces.</li> <li>• Describe how the “living legacy” of art is both perpetuated and influenced through cultural festivals and programming (such as Tanglewood and Jacob’s Pillow) .</li> <li>• Explore the positive and negative impacts that art colonies have on the towns and permanent residents of the area. Describe the economic effects.</li> <li>• Describe how the basis for the local economy evolved from extractive industry to a culture and tourism based economy that uses natural, historical and scenic beauty as assets.</li> <li>• Describe how artists in the Upper Housatonic Valley had impacts on the American imagination and influenced American literature, painting, fashion, and folk art and the economy and financed homes, businesses, and public buildings, and influenced the local architecture and landscape.</li> <li>• How did paved roads, railroads, and the condition of late 19<sup>th</sup> century cities affect the development of the arts in the Upper Housatonic Valley? How did the arts affect landscape, land ownership, population, and economy?</li> <li>• Answer the question of why this place is a cultural center by describing the forces that have sustained it.</li> </ul>	<ul style="list-style-type: none"> <li>• Writers: <ul style="list-style-type: none"> <li>– Nathaniel Hawthorne</li> <li>– Herman Melville</li> <li>– Edith Wharton</li> <li>– Catharine Maria Sedgwick</li> </ul> </li> <li>• Artists <ul style="list-style-type: none"> <li>– Norman Rockwell</li> <li>– Jasper Johns</li> <li>– Daniel Chester French</li> </ul> </li> <li>• Performing Arts Centers: <ul style="list-style-type: none"> <li>– Tanglewood</li> <li>– Music Mountain</li> <li>– Norfolk Chamber Music festival</li> <li>– Jacob’s Pillow</li> <li>– Shakespeare &amp; Company</li> </ul> </li> <li>• Resort towns: <ul style="list-style-type: none"> <li>– Stockbridge, MA</li> <li>– Lenox, MA</li> </ul> </li> <li>• Influences of the arts festivals on music, dance, etc. in America an influences on the performing artists.</li> <li>• Artist-in-Residence programs</li> <li>• Connections to historic social, civic, patriotic, and conservation movements</li> <li>• Neighbors and community members who interacted with arts colonies</li> <li>• Local networks of workers and volunteers who exist to support the colonies.</li> <li>• Economic impact of the arts on the local area.</li> </ul>

Connections to the Land	
<p><b>The Upper Housatonic Valley has been devastated by centuries of extractive industry, but over time and through activism and dedicated conservation efforts, its reclaimed and restored historical, agricultural, and scenic landscapes are at the core of the region’s identity and economy. The restoration of the Housatonic River remains an ongoing struggle.</b></p>	
Theme #2	
Concepts and Ideas	Topics and Stories
<ul style="list-style-type: none"> <li>• Describe the state of natural resources, including plant, animal and aquatic life in the 18<sup>th</sup> and 19<sup>th</sup> centuries and the interplay between people and the environment.</li> <li>• Trace overland and riverside trails created by Native Americans which became horse and cart paths and some of today’s heavily traveled routes.</li> <li>• Trace the exploration and settlement patterns of the Dutch, English, and French in and around the Valley. What wildlife did they see and how has that changed?</li> <li>• Describe the New England town settlement patterns (common lands, village centers)</li> <li>• Explain how the Housatonic became polluted. Describe and illustrate the effect of polluted rivers and industrial waste on a population.</li> <li>• Track how recreation has contributed to the well-being of people, communities and the economy of the Upper Housatonic Valley.</li> <li>• Describe how, over time, people of the Upper Housatonic Valley have embraced and pioneered an environmental stewardship ethic and illustrate how appreciation is demonstrated.</li> <li>• List the authentic natural and built environments of the Upper Housatonic Valley and describe the ways that those landscapes are maintained.</li> <li>• Enumerate species that thrive in Valley ecosystems. Explain why this is significant.</li> <li>• Explain the geologic history of the region and the river. How did the river, rocky hills, veins of marble, and limestone outcroppings form.</li> <li>• Describe how industry altered settlement and town patterns and differentiated housing for types of workers.</li> <li>• Track the water power system from mill ponds to river dams to storage reservoirs and locate what remains today.</li> <li>• Illustrate the ways that historic structures have been preserved and describe their contributions to strengthening communities in the Upper Housatonic Valley.</li> <li>• Describe how early tourist roads and mountain preserves evolved. Relate the process by which scenery is monetized and becomes exclusive.</li> <li>• Describe the village improvement movement, its regional origins, and its effects on town politics, individual rights, and economic choices.</li> <li>• Explain the origins and ongoing the river protection initiatives applied to the Housatonic River. Describe the efforts and progress made to restore and protect the health and natural beauty of rivers.</li> <li>• Explain the social and economic values of clean, scenic waterways.</li> </ul>	<ul style="list-style-type: none"> <li>• Source to Sound Paddle trip</li> <li>• Housatonic Valley Association (HVA)</li> <li>• Cleaning the Housatonic River</li> <li>• Use without overuse</li> <li>• Continental collision and separation</li> <li>• Glaciation and metamorphic rock</li> <li>• Water Quality Monitoring,</li> <li>• Flow Monitoring,</li> <li>• Storm Drain Awareness</li> <li>• Streamside Buffers</li> <li>• Water health index</li> <li>• Climate change</li> <li>• Invasive species (such as Zebra Mussels)</li> <li>• Western New England Marble Valley ecosystem</li> <li>• Berkshire Taconic Landscape</li> <li>• Lower Berkshire Hills ecosystem</li> <li>• Sweet water wetlands</li> <li>• Floodplain forests in CT</li> <li>• Fragile bogs</li> <li>• River Walk (town)</li> <li>• Appalachian Trail</li> <li>• Indian trails developed into modern transportation routes</li> <li>• Charcoal industry</li> <li>• Modern conservation movement</li> <li>• PCB’s in the Housatonic River</li> <li>• Jacob’s Ladder trail</li> <li>• Sustainable farming movement</li> <li>• Merino Sheep as industry</li> <li>• Dairy Industry</li> <li>• Laurel Hill Association</li> <li>• Berkshire Cottages land grab</li> </ul>

APPENDIX 3 continued

<ul style="list-style-type: none"><li>• Describe the founding and role of the Housatonic Valley Association and other environmental partners. Describe the role of the Upper Housatonic Valley and its full and part-time residents in the conservation movement. Describe the scope and scale of the task to protect and restore the Housatonic land and waters.</li><li>• Describe the origins and continued impact of the Appalachian Trail on the Upper Housatonic Valley.</li><li>• Explain the origins and activities of the Laurel Hill Association and what the organization was reacting against. Was there friction as the ideas spread? Is that same friction evident today?</li><li>• Debate what the economic condition of the Upper Housatonic Valley may have been without conservation efforts of the late nineteenth and early twentieth century.</li><li>• Describe the effect of extractive industries and their effects on the environmental degradation. Show the relevance of this to modern environmental issues in the US and the world.</li><li>• Celebrate the conservation and recovery of the landscape. Explain how the land is different today than in 1700.</li><li>• Describe the negative impact of transportation routes such as the Western Railroad in the 1830s and the Jacob’s Ladder Trail in 1910 on the natural environment. Describe the environmental costs of progress, engineering marvels, and greater public access.</li><li>• Describe the positive and negative impacts of the wealthy buying land from impoverished farmers and conserving and/or donating that land to public use.</li><li>• Describe the modern sustainable farming movement and Community Supported Agriculture.</li><li>• List the many challenges to maintaining a useful and scenic landscape, including affordable housing, rural sprawl, and need for economic development that doesn’t mar the landscape or over use it.</li></ul>	
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Cradle of Industry	
<p><b>Innovation in the iron, wool, paper, and electricity generation industries led to prosperity as well as to exploitation of natural resources and pollution. The twenty first century ushered in an era of economic distress that has been partially relieved by the development of an economy based on artistic creativity and on the preservation and enjoyment of restored natural resources.</b></p>	
Theme #3	
Concepts and Ideas	Topics and Stories
<ul style="list-style-type: none"> <li>• Describe the pioneering role of individual industries and their effect on the Upper Housatonic region, the nation and the world. What role did locality, opportunity, problem-solving, and innovation play?</li> <li>• Explain Native American technologies for food growing, processing, storage as well as tool, utensil, and building construction.</li> <li>• Describe how—over time—the Upper Housatonic Valley fostered prosperity and furthered the evolution of capitalism through innovation, economic entrepreneurship, and use of natural resources. Compare with other industrial centers.</li> <li>• Describe the negative impacts of early industry on the area’s natural resources and the movement to restore the natural environment through regulation and conservation measures.</li> <li>• Explain how is charcoal produced and how it affects the land.</li> <li>• Describe the use of water power and the effects on the environment.</li> <li>• Discuss the lives of industry workers and their families. Contrast the stories and lives of the wealthy, working, and the poor in the Upper Housatonic; what was different and what did they share in common?</li> <li>• Explain where lime is found and how it is extracted and used in industry.</li> <li>• Trace the cycle from industrialization to deindustrialization and the effect that each had on the landscapes and people of the Upper Housatonic.</li> <li>• Describe how the Upper Housatonic’s industries and agriculture supplied the Continental Army during the American Revolution, the Civil War, and World Wars I and II.</li> <li>• Explain the significance of alternating current generation and transformers and how important this innovation was in harnessing electricity and transmitting power long distances to power industry and homes.</li> <li>• Explore noteworthy industrial contributions of people like William Stanley (electricity) and Zenas Crane (paper). Explain the science and trace their careers and their accomplishments in business and to society.</li> <li>• Explain how electricity is generated, the role of transformers, alternating current, and the manufacture and use of generators.</li> <li>• Describe the impact that innovations such as the plastic, Lexan, had on military and industrial production and household use.</li> <li>• Compare and contrast the Upper Housatonic’s industry and industrial development with other major industrial centers.</li> </ul>	<ul style="list-style-type: none"> <li>• Iron and blast furnaces and forges</li> <li>• Paper Mills</li> <li>• Electricity generation</li> <li>• Marble, limestone, granite quarries</li> <li>• Iron ore</li> <li>• Cannon Works</li> <li>• Smelting process</li> <li>• Lime and use in manufacturing</li> <li>• Plaster</li> <li>• Glassmaking</li> <li>• Alternating current transformer</li> <li>• General Electric</li> <li>• Plastics</li> <li>• Pittsfield Plant</li> <li>• Salisbury District</li> <li>• Housatonic Railroad</li> <li>• Supplying Continental Army</li> <li>• Resort Communities</li> <li>• Economic innovations in industries</li> <li>• Significant architectural features, archival materials, and museum collections illustrative of this period.</li> <li>• Industrialists such as:               <ul style="list-style-type: none"> <li>– William Stanley</li> <li>– George Westinghouse</li> <li>– Zenas Crane</li> </ul> </li> <li>• Tourism</li> <li>• Recreation</li> <li>• Conservation</li> <li>• Labor</li> <li>• Land Conservation</li> <li>• Sustainable agriculture</li> <li>• First telephone demonstration</li> <li>• Industrial Memory</li> <li>• Adaptive Reuse</li> </ul>

**APPENDIX 3** *continued*

<ul style="list-style-type: none"><li>• Describe how the economic base for the Upper Housatonic region was re-imagined and shifted from an industrial and manufacturing base that used the natural resources to one that conserved resources.</li><li>• List the effects of intensive industry on the natural resources of the Upper Housatonic Valley.</li><li>• Discuss the image of industry in the Valley’s collective memory. How have adaptive reuse efforts affected that?</li></ul>	
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THE PURSUIT OF FREEDOM AND LIBERTY	
<p>Since before the founding of the nation, many nationally significant events that ushered in new eras of personal and political freedom, religious tolerance, enfranchisement, and civil rights took place in the Upper Housatonic Valley. In the eighteenth century, Valley inhabitants denied human rights to local Native Americans and to African Americans they enslaved.</p>	
Theme #4	
Concepts and Ideas	Topics and Stories
<ul style="list-style-type: none"> <li>Describe economy, culture, and migratory patterns of Mohicans who lived in woodlands and along waterways in the Upper Housatonic. Discuss the archaeological record of the Mohicans and where they live today.</li> <li>Describe hardships, contested visions, difficult choices, betrayals, and complicated alliances faced by American Indians regarding European settlement. Explore various American Indian alliances among tribes, Americans and British.</li> <li>Explain the Sheffield Declaration, its sources and impact.</li> <li>Explain the significance to the American Revolution of the August 1774 occupation of the courthouse in Great Barrington.</li> <li>Trace the route and describe the ordeal of General Knox hauling cannon from Fort Ticonderoga across the Berkshires in winter to Boston.</li> <li>Describe what economic and political conditions drove Daniel Shays and his followers toward “rebellion.” Trace its roots to earlier movements for liberty and describe the local and national consequences of their actions.</li> <li>Describe how, in 1781, an enslaved woman named Bett (Elizabeth Freeman) used the natural rights argument to bring a lawsuit against owner John Ashley to gain her freedom. Explain how this milestone led to the end of slavery in Massachusetts.</li> <li>Place Elizabeth Freeman’s story in context of stories of other African American women—free and enslaved—who worked to keep their families together, worked for personal rights, became activists and/or inspiration for others. Describe how pervasive slavery was in northern states. Contrast and compare slavery in New York and New England with enslavement in southern states.</li> <li>Trace the history and influence of Massachusetts abolitionism by comparing and contrasting the Commonwealth’s efforts with surrounding states and the nation.</li> <li>Explore stories Underground Railroad activity throughout the Upper Housatonic Valley and describe the historical evidence.</li> <li>Explain the influences of a childhood in the Upper Housatonic Valley in the late nineteenth century on W.E.B. Du Bois, his life and work. Connect with his later years as a national and international figure.</li> <li>Describe the role of Mass 54<sup>th</sup> chaplain Samuel Harrison in seeking equal payment for African American Civil War soldiers. Explain the influence of his writings on national efforts to fight racism and bigotry.</li> <li>Describe the context for the establishment of the Hancock Community of Shakers in the 1790s, Explore the Community’s goals and purposes, its successes and failures.</li> <li>Explain the development of the Hancock Community, its growth and connections to other Shaker communities within and outside of the religion. Trace the demise of the Shaker movement in New England and America as illustrated by the Hancock.</li> </ul>	<ul style="list-style-type: none"> <li>218 archaeological sites of Mohican Indians in 33 communities</li> <li>Stockbridge Indian Town</li> <li>Elizabeth Freeman (“Mum Bett”)</li> <li>Agrippa Hull</li> <li>W.E.B. Du Bois</li> <li>Daniel Shays and Shay’s Rebellion</li> <li>Hancock Shaker community and later Village</li> <li>Sheffield Declaration</li> <li>Samuel Harrison House</li> <li>Economic liberty</li> <li>Economic and community development in the Berkshires</li> <li>Berkshire Convention</li> <li>Boycott of British goods</li> <li>1774 Resistance in Great Barrington</li> <li>John Ashley</li> <li>Intolerable Acts</li> <li>Ethan Allen, Green Mountain Boys,</li> <li>Ft Ticonderoga and the Knox Trail</li> <li>Equal pay for African American soldiers</li> <li>Salisbury iron</li> <li>Economic depression after the American Revolution</li> <li>Christian denominations: <ul style="list-style-type: none"> <li>Congregational Church</li> <li>Puritans</li> <li>Christian Indian Mission in Stockbridge</li> <li>Stockbridge Indians</li> <li>Methodists</li> <li>Baptists</li> <li>Shakers</li> <li>Catholics: Jesuits and Franciscans, monasteries</li> </ul> </li> <li>Immigrants</li> <li>Irish Catholic immigrants establish St. Joseph’s in Pittsfield in 1844</li> <li>20<sup>th</sup> century health link to spirituality</li> <li>Daniel Chester French and Lincoln sculpture</li> <li>James Weldon Johnson</li> <li>Photographer James VanderZee</li> </ul>



APPENDIX 3 continued

<ul style="list-style-type: none"><li>• Differentiate the Hancock Shaker community from other religious and utopian communities of the era in New England and in the United States.</li><li>• Describe the influx of immigrants in the late 19<sup>th</sup> century and how they changed the workplace and public and religious institutions. Contrast 19<sup>th</sup> century immigrants with those of today.</li><li>• Identify early civil rights leaders, explain early civil rights efforts in the Upper Housatonic, and why these ideas were born or took hold in the region. Explain the significance of W.E.B. Du Bois work.</li><li>• Describe the scale, scope, and evolution of spiritual organizations in the Upper Housatonic from early Congregationalists and pan-Protestantism to modern spiritual retreats.</li><li>• Describe how artists like Daniel Chester French and Norman Rockwell represented concepts of freedom and liberty in their artistic works, such as French’s sculpture of Lincoln and Rockwell’s civil rights painting <i>The Problem We All Live With</i>.</li><li>• Speculate why independent and progressive thinkers in education, economics, and health have found fertile ground in the Valley.</li></ul>	<ul style="list-style-type: none"><li>• First synagogue Pittsfield, 1869</li><li>• Kent School</li><li>• Berkshire School</li><li>• Simon’s Rock</li><li>• Austen Riggs</li></ul>
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## APPENDIX 4

### Inventory of Natural, Historical, Cultural, Educational, Scenic, and Recreational Resources

#### Upper Housatonic Valley Sites National Register of Historic Places

This is a comprehensive list of all resources in the region regardless of their relationship to the work of Housatonic Heritage. See Section 4.5 of this report which identifies Housatonic Heritage's key partners and their agreed upon actions.

#### Historic

##### Connecticut Litchfield County

##### National Register Historic Districts

Canaan	Falls Village Historic District	Salisbury	Lakeville Historic District
Colebrook	Colebrook Center Historic District	Salisbury	Lime Rock Historic District
Colebrook	Phelps Farms Historic District	Salisbury	Salisbury Center Historic District
Kent	Flanders Historic District	Sharon	Sharon Historic District
Norfolk	Norfolk Historic District	Sharon	Sharon Valley Historic District
North Canaan	Canaan Village Historic District		

##### Properties individually listed on the National Register of Historic Places

Canaan	Samuel Forbes Homestead	Norfolk	Moseley House
Canaan	Holabird House	Norfolk	Moss Hill
Canaan	Isaac Lawrence House	Norfolk	Mulville House
Canaan	Music Mountain	Norfolk	Noble House
Canaan	South Canaan Congregational Church	Norfolk	Norfolk Country Club House
Colebrook	Colebrook Store	Norfolk	Norfolk Downs Shelter
Colebrook	Arah Phelps Inn	Norfolk	Rectory and Church of the Immaculate Conception
Cornwall	Bridge No. 560		
Cornwall	Cornwall Bridge Railroad Station	Norfolk	Rockwell House
Cornwall	Cream Hill Agricultural School	Norfolk	John Shepard House
Cornwall	Red Mountain Shelter	Norfolk	Sports Building
Cornwall	Rumsey Hall	Norfolk	Robbins Stoeckel House
Cornwall	Major General John Sedgwick House	Norfolk	Tamarack Lodge Bungalow
Cornwall	West Cornwall Bridge	Norfolk	Tom Thumb House
East Canaan	Beckley Furnace Industrial Monument	Norfolk	World War I Memorial
Kent	Captain Philo Beardsley House	North Canaan	Union Depot
Kent	Bull's Bridge	Salisbury	Bridge No. 2305
Kent	Kent Iron Furnace	Salisbury	John C. Coffing House
Norfolk	Francis Benedict, Jr. House	Salisbury	Mount Riga Ironworks Site
Norfolk	Braman Camp	Salisbury	Scoville Memorial Library
Norfolk	Starling Childs Camp	Salisbury	Scoville Power House
Norfolk	Farnum House	Sharon	Cream Hill Shelter
Norfolk	Gould House	Sharon	Ebenezer Gay House
Norfolk	Haystack Mountain Tower	Sharon	George King House
Norfolk	Hillside	Sharon	James Pardee House
Norfolk	Low House	Sharon	Governor Smith Homestead
Norfolk	Mead Camp	Warren	Warren Congregational Church

Source: U.S. Department of the Interior, National Register of Historic Places Database available at <http://nrhp.focus.nps.gov/natreghome.do?searchtype=natreghome>.

## APPENDIX 4 *continued*

### Massachusetts: Berkshire County

#### National Historic Landmarks

Becket	Jacob's Pillow Dance Festival
Dalton	Crane & Company Old Stone Mill Rag Room
Great Barrington	W.E.B. Du Bois Boyhood Homesite
Lenox	Edith Wharton's Estate - The Mount
Pittsfield	Arrowhead (Herman Melville House)
Pittsfield	Hancock Shaker Village
Stockbridge	Chesterwood (Daniel Chester French Home and Studio)
Stockbridge	Mission House
Stockbridge	Naumkeag

#### National Register Historic Districts

Becket	Becket Center Historic District
Becket	Middlefield-Becket Stone Arch Railroad Bridge Historic District
Becket	North Becket Village Historic District
Dalton	Cranesville Historic District
Egremont	North Egremont Historic District
Egremont	South Egremont Village Historic District
Great Barrington	Taconic and West Avenues Historic District
Lee	South Lee Historic District
New Marlborough	Mill River Historic District
New Marlborough	New Marlborough Village
Pittsfield	Park Square Historic District
Pittsfield	Upper North Street Commercial District
Richmond	Richmond Furnace Historical and Archeological District
Sheffield	Sheffield Center Historic District
Sheffield	Sheffield Plain Historic District
Stockbridge	Elm-Maple-South Street Historic District
Stockbridge	Main Street Historic District
Stockbridge	Old Curtisville Historic District
Stockbridge	Shadow Brook Farm Historic District
Tyringham	Tyringham Shaker Settlement Historic District
Washington	Lower Historic District
Washington	Upper Historic District

#### Properties individually listed on the National Register of Historic Places

Dalton	Dalton Grange Hall No. 23	Great Barrington	Mahaiwe Block
Dalton	East Main Street Cemetery	Great Barrington	Monument Mills
Dalton	Fairview Cemetery	Great Barrington	Rising Paper Mill
Dalton	Main Street Cemetery	Great Barrington	Searles Castle
Egremont	Westover-Bacon-Potts Farm	Great Barrington	Society of the Congregational
Great Barrington	Clinton A.M.E. Zion Church		Church of Great Barrington
Great Barrington	Dwight-Henderson House	Great Barrington	U.S. Post Office (Main)



## APPENDIX 4 *continued*

Hancock	Hancock Town Hall	Pittsfield	Old Town Hall
Interlaken	Citizens Hall	Pittsfield	Pilgrim Memorial Church and Parish House
Lanesborough	Pettibone Farm	Pittsfield	Pittsfield Cemetery
Lanesborough	Saint Luke's Episcopal Church	Pittsfield	Charles Whittlesey Power House
Lee	Golden Hill Bridge	Pittsfield	Providence Court
Lee	Hyde House	Pittsfield	South Mountain Concert Hall
Lee	Hyde School	Pittsfield	Springside Park
Lee	Merrell Tavern	Pittsfield	Wahconah Park
Lenox	Church on the Hill	Pittsfield	Wollison-Shipton Building
Lenox	Elm Court	Pittsfield	Goodwood
Lenox	Lenox Academy	Pittsfield	Kenmore
Lenox	Lenox High School	Richmond	Nichols-Sterner House
Lenox	Lenox Library	Richmond	Northeast School
Lenox	Lenox Railroad Station	Richmond	Shaker Farm
Lenox	Trinity Episcopal Church	Richmond	Col. John Ashley House
Lenox	Ventfort Hall	Richmond	Old Covered Bridge
Lenox	Wheatleigh	Sheffield	Glendale Power House
Monterey	Rev. Adonija Bidwell House	Sheffield	Stockbridge Casino
Monterey	Captain John Brewer House	Stockbridge	Villa Virginia
Monterey	Rock Ridge	Stockbridge	Methodist Episcopal Society of Tyngham
Mount Washington	Benjamin Osborn House	Stockbridge	Clark-Eames House
New Marlborough	Thomas Shepard House	Tyringham	Philip Eames House
Pittsfield	Allen Hotel		Saint Andrew's Chapel
Pittsfield	William Russell Allen House	Washington	Sibley-Corcoran House
Pittsfield	Berkshire Life Insurance Company	Washington	South Center School House
		Washington	Congregational Church of West Stockbridge
Pittsfield	Eaton Crane and Pike Company Factory	Washington	West Stockbridge Grange No. 246
		Washington	
Pittsfield	Samuel Harrison House	West Stockbridge	
Pittsfield	Morewood School		
Pittsfield	Old Central Fire Station	West Stockbridge	
Pittsfield	Old Central High School		

### Educational

Bard College at Simon's Rock  
 Berkshire Community College  
 Massachusetts College of the Liberal Arts  
 University of Connecticut at Torrington  
 University of Massachusetts Amherst

**Natural, Scenic and Recreational**

The resource list below includes State Parks, Trails, State Forests, gardens, wildlife refuges, farms and wineries. Numerous cultural resources in the heritage area operate within natural and or scenic settings—Music Mountain, The Mount, Jacob’s Pillow, to name just three—but those listed below have, as their primary purpose, the enjoyment of natural, scenic and recreational experiences.

Appalachian Trail	Lake Waramuag State Park
Ashuwillticook Rail Trail	Land of Nod Winery
Bartholomew’s Cobble (National Natural Landmark)	Les Trois Emme Winery
Bash Bish Falls State Park	Lime Kiln Farm Wildlife Sanctuary
Beartown State Forest	Lime Rock Park
Becket Land Trust Historic Quarry and Forest	Macedonia Brook State Park
Beckley Furnace Industrial Monument	Mohawk State Forest
Berkshire Botanical Garden	Mount Everett State Reservation
Berkshire National Fish Hatchery	Mount Greylock State Reservation
Campbell Falls State Park	Mount Washington State Forest
Dennis Hill State Park	October Mountain State Forest
Haystack Mountain State Park	Pittsfield State Forest
Highlawn Farm	Pleasant Valley Wildlife Sanctuary
Hilltop Orchards	Project Native
Housatonic Meadows State Park	Santarella Museum & Gardens
Indian Line Farm	Sharon Audubon Center
Ioka Valley Farm, LLC	Wahconah Falls State Park
Jug End State Reservation	Windy Hill Farm
Kent Falls State Park	

**Cultural**

Animagic	Berkshire Music Hall
Appalachian Trail	Berkshire Music School
Arrowhead	Berkshire National Fish Hatchery
Ashuwillticook Rail Trail	Berkshire Opera Company (Pittsfield)
Aston Magna Summer Festival	Berkshire Scenic Railway Museum
Barrington Stage Company	Berkshire Theater Festival (Stockbridge)
Bartholomew’s Cobble	Berkshire Theatre Festival
Bash Bish Falls State Park	Bidwell House Museum
Beartown State Forest	Campbell Falls State Park
Becket Arts Center	Chesterwood
Becket Land Trust Historic Quarry and Forest	Close Encounters With Music
Beckley Furnace Industrial Monument	Close Encounters with Music (Great Barrington)
Berkshire Athenaeum	Col. John Ashley House
Berkshire Bach Society	Colonial Theater (Pittsfield)
Berkshire Botanical Garden	Colonial Theatre
Berkshire Choral Festival	Connecticut Antique Machinery Association
Berkshire Community College	Crane Museum of Papermaking
Berkshire Concert Choir / Stockbridge Singers	Dennis Hill State Park
Berkshire Fringe	Edith Wharton’s Estate - The Mount
Berkshire International Film Festival	Ferrin Gallery
Berkshire Lyric Theater	Frelinghuysen Morris House & Studio
Berkshire Lyric Theater	Hancock Shaker Village
Berkshire Museum	Haystack Mountain State Park

#### APPENDIX 4 *continued*

Highlawn Farm	Naumkeag Museum and Gardens
Hilltop Orchards	Norfolk Chamber Music Festival
Housatonic Meadows State Park	Norman Rockwell Museum
Indian Line Farm	October Mountain State Forest
Infinity Music Hall & Bistro	Pittsfield State Forest
Ioka Valley Farm, LLC	Pleasant Valley Wildlife Sanctuary
Jacob's Pillow Dance Festival	Project Native
Jug End State Reservation	Robbins-Zust Marionettes (Richmond)
Kent Falls State Park	Samuel Harrison Society
Lake Waramuag State Park	Santarella Museum & Gardens
Land of Nod Winery	Shakespeare & Company
Les Trois Emme Winery	Shakespeare & Company (Lenox)
Lime Kiln Farm Wildlife Sanctuary	Sharon Audubon Center
Lime Rock Park	Sharon Playhouse
Macedonia Brook State Park	Sheffield Historical Society
Mac-Haydn Theatre - (Chatham NY)	Sloane Stanley Museum
Mahaiwe Performing Arts Center	South Mountain Concerts
Mahaiwe Performing Arts Center (Great Barrington)	South Mountain Concerts (Pittsfield)
Main Street Stage (North Adams)	Stockbridge Chamber Concerts (Great Barrington)
Miniature Theater of Chester (Chester)	Tanglewood
Mission House Museum and Gardens	Tanglewood (Lenox)
Mohawk State Forest	Theater Barn (New Lebanon NY)
Mount Everett State Reservation	Town Players (Pittsfield)
Mount Greylock State Reservation	Ventfort Hall Mansion & Gilded Age Museum
Mount Washington State Forest	Wahconah Falls State Park
Music & More In The Meeting House	Walden Chamber Players (various locations)
Music Mountain	Williams College Dept. of Music (Williamstown)
Music Works (various locations)	Williamstown Theater Festival (Williamstown)
National Shrine of The Divine Mercy	Windy Hill Farm



### Thematic History of the Upper Housatonic Valley

Archaeologists speculate that the first Paleo-Indians appeared in what are now Berkshire and Litchfield counties at least 6,000 years ago. Evidence suggests that they lived in small hunting, gathering, and fishing communities in the forests, on riverbanks, and along the coastline. Over thousands of years their populations increased as they learned to manage their environments sustainably by cultivating plants for food, medicines, clothing, tools, and shelter. In addition to corn, beans, and squash, they raised sunflowers, herbs, reeds, flax, and tapped maple trees for sap. They hunted and fished according to the changing seasons.

Paleo-Indians and their descendants developed increasingly sophisticated technologies appropriate to the woodlands and waters. They dried and cured food and fashioned stone and wood tools, implements, and utensils. They formed clay pots, made leather and bark-based textiles for clothing, processed reeds for basketry, framed longhouses, and built canoes. Over time, they developed social and political traditions and religious ceremonies based on food, seasons, and their economy, the importance of family and their larger communities, and the natural and supernatural worlds. Woodland Period Indians (roughly 1000 BCE to 1000 CE), though relatively few in number—their population throughout western New England numbered just 20-50,000--conducted controlled burns of forest lands to reduce brush, encourage nut-bearing vegetation, and facilitate quiet stalking of game.

By 1600, the majority of Native American settlements in the Upper Housatonic Valley were “Mohican,” often translated as “people of the waters that are never still,” a name that refers to rivers of the area, especially the Hudson and the Housatonic. As many as sixty villages may have comprised a Mattabesic Confederation of perhaps thirteen clans in northwest Connecticut, primarily in Litchfield County. Unlike the Mohicans in Massachusetts, the Mattabesic seasonally migrated from the forests where they hunted deer, wild turkey, and other game to the coast for fishing and gathering shellfish. But, like the Mohicans, they cultivated corn, beans, squash, and other plants and referred to

their homeland valley as “Usiadienuk” or “beyond the mountain place,” or perhaps “river of the mountain place.” By 1700, the Mattabesic population in western Connecticut numbered less than one thousand, although they were thought to still control about 500,000 acres. The Mohicans fared only slightly better. In 1600, there may have been 30,000 members, in part because Mohicans included all Algonquian tribes between the Hudson River and the Connecticut River Valley. By 1672, that number had plummeted to 1,000 through encroachment, assimilation, intermarriage, migration, and death due to disease. At the lowest population point in 1796, there were about 300 “Stockbridge” Native Americans living with the Oneida in upstate New York, and few remaining in Stockbridge.

The valley would see little foreign settlement until nearly 1700. The “Berkshire barrier” of high rugged forested hills delayed colonization from the east by the English and the west by the Dutch. Settlement from the north by the French was prevented by the lack of direct water access from the St. Lawrence River as well as the obstruction of the Green Mountains, the Hoosac Range, and the Taconic Range, all part of the Appalachian Chain.

In just three years, 1607-1609, England, France, and the Netherlands claimed land on the east coast of North America:

- Permanent English settlers arrived in Jamestown in 1607 and English colonists arrived at Plymouth in 1620. Unlike the Dutch, their thirst was for religious freedom and permanent settlement, not trade. The Wampanoag tribe was of great assistance. Within just fifteen years, Boston was established by a wave of English Puritan settlers, and parties of settlers migrated up the Connecticut River to found Windsor, Hartford, and Springfield (founded in 1636 by William Pynchon to engage in profitable beaver pelt trade) to take up fertile lands.

The following year, in 1608, Samuel de Champlain, acting for France’s King Henry IV, established Ville de Québec on the St. Lawrence River and the colony grew to over 350 residents by 1640. Champlain deftly

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allied his colonists with the Algonquian and encouraged young Frenchmen to live with Native Americans and learn their language and customs for the purpose of garnering Indian allegiance to the French king. Thus, the seeds of the French and Indian War—almost 150 years later—were sown.

The next year, 1609, Henry Hudson claimed New York's Hudson River Valley as New Netherland. By 1611 the Dutch had built a lucrative beaver pelt trade with the Mohicans in the Hudson River Valley as well as in western Connecticut and Massachusetts. The Mohicans (and their sometime enemies, the Mohawk) received cooking pots and metal weapons in return. In the process, they were also exposed to typhus, measles, and influenza.

By 1640 these English colonists had fairly successfully occupied central New England. Native Americans were pushed westward toward the Housatonic River Valley where they served as a buffer between the Mohawks and English settlements in Massachusetts and Connecticut.

The Connecticut, Massachusetts, New Haven, and Plymouth colonies formed the New England Confederation in 1643 as a military alliance against Native Americans and the Dutch. The Housatonic Valley—far to the west—was not represented in the Confederation. The Confederation's political and military union would play an important role in King Philip's War (1675-76) and in later New England-wide action against the Native Americans, the Dutch, the French and, eventually, the English themselves. The Mohicans sometimes were enlisted by and fought with New England Confederation forces.

By 1680 much of the course had been set for future colonization in North America. The English had a firm hold on most of coastal North America, believing that they had secured all of New England. The Dutch had been driven from Connecticut and New Netherland. The French were surrounded by the English—to the south by New England to the north by the Hudson Bay territories and the beginnings of Upper Canada.

Forty years before the settlement of the Upper Housatonic Valley, Dutch traders established a thriving

beaver pelt trade with Native Americans (probably Mohicans) near Albany. Robert Livingston arrived in Albany in 1674 and established profitable trading relationships with the Indians. Within ten years, he had bought rights to large tracts of land east of the Hudson. He named it Livingston Manor and offered to resettle Dutch farmers from the Hudson River Valley there as early as 1672. The Patent of Westenhook, signed in 1705, was the culmination of several earlier (1685 through 1704) sales of land to a group headed by Peter Schuyler and Derrick Wessels. While boundaries of this land—as well as Livingston Manor—were, at best, obscure, they included fairly large parts of the Berkshires and northwest Connecticut. It took until 1787 to settle various land claims and declare a firm, final border between Massachusetts and New York.

The land was a rocky, forbidding, remote, a sparsely traveled wilderness. But, with pressure on land to the east due to an expanding population, the valley's marginal lands looked good. In May 1722, two hundred petitioners requested two tracts of land on the Housatonic River. These two tracts would be known as the Upper Housatonic Township and the Lower Housatonic Township and they were recognized by the General Court of Massachusetts Bay in 1722. Within just two years (1724), sale of all land in the townships had been completed. The Mohican were without a home. A new permanent settlement of the Valley by the English and many others had been established.

Though no one knows the circumstances of the first Euro-Americans to settle in the Upper Housatonic Valley, there is little disputing that the earliest prominent home was the Sheffield home of Colonel John Ashley built in 1735, ten years after the town was settled. It quickly became the center of Sheffield's social, economic, and political life. There, in 1773, John Ashley headed a committee of eleven men that drafted the Sheffield Resolves, a petition against British tyranny and a manifesto for individual rights. After a vigorous debate, the resolves were accepted by the Sheffield town meeting and then published in the *Massachusetts Spy*. Some of the language of natural rights was echoed in Thomas

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Jefferson's Declaration of Independence and in the Massachusetts Constitution. The Ashley House, now owned by the Trustees of Reservations, is recognized in the National Register of Historic Places and as a National Historic Landmark. Nearby, the 329-acre Bartholomew's Cobble (featuring two rocky knolls, hence the name "cobble") once owned by John Ashley, is also a Trustees site and a National Natural Landmark. This preserve contains more than 800 plant species.

In Massachusetts, farms and homesteads were settled from the west by the Dutch from Kinderhook, NY, the east by the English from Westfield, MA, and from the south by farmers from along the Connecticut border. These farmers probably settled in what is now Mount Washington during the late 1690s as they sought relief from onerous Livingston land policies in New York. They soon drifted down the mountain into Egremont and Sheffield. Within 35 years (1730 to 1765), all of Connecticut's present-day towns were settled—albeit sparsely. Similarly, the Massachusetts towns were established over a 60 year period between 1692 and 1755. Census records from 1761 suggest a total population in the Upper Housatonic Valley of no more than 7,000: about 2,000 in Massachusetts and just over 5,000 in Connecticut. The Upper Housatonic Valley had been de-populated of Native Americans and repopulated with colonists in less than 100 years.

In 1760, the English settlers found the Upper Housatonic to be a rough wilderness. The beaver was already extinct because of the high price their pelts brought on the European market. The English settlers hunted threatening animals like bear, wolves, and rattlesnakes, and nearly eradicated them. They found plentiful turkeys, deer, foxes, wildcats, woodchucks, raccoons, and skunks along with porcupines, rabbits, weasels, muskrats, and minks. By 1800, the deer and turkeys had been so avidly hunted that they were scarce. Below the falls and dams settlers fished for perch, trout, catfish, sunfish, eels and shiners. They caught freshwater clams, turtles, snakes. Below waterfalls and dams, migratory fish like salmon and shad were plentiful. In the rustic wilderness the new

farmers confronted stood great oaks, chestnuts, sugar maples, ash, and beech.

Establishing communities enabled the colonists to secure land, start permanent settlements, and coordinate defense. The communities' physical layout followed the distinctively New England small town pattern: one or more meeting houses (always Protestant with Congregationalism dominant) and schools on town common lands (and later fronting a more formal common); a separate nearby area for commerce; small lots for in-town residential sites; dry stack walls surrounding partitioned agricultural land; and a street and farm-to-market road grid as regular as possible given the valley's rugged topography.

The settlers in the hill towns lived a hard existence. With a short growing season, sloping fields, and thin soil more suited to grazing, many hill town farmers were in debt to wealthier land owners from the larger riverside towns. Still, they raised wheat, rye, oats, barley, corn and buckwheat, and, after 1800, planted orchards to bear apples, pears, and plums to be processed and sold in villages. In the winter, farmers made money by cutting timber from their woodlots to sell to local saw mills as firewood for villagers or for charcoal production for ironworks.

Nine out of 10 residents of the Upper Housatonic Valley made their living in agriculture. These were largely an independent, self-determined, and self-sufficient group. They lived in small, interconnected communities, where face-to-face contact was the norm for religious, political, and business transactions. Society was family and village-centered, and town meeting served as a democratizing force.

In 1810, the nation's first county agricultural society was formed at Pittsfield with the purpose of serving local common farmers as well as the gentry farmers. One year later, the nation's first agricultural fair, called the Berkshire County Fair, featured a parade of three or four thousand animals as well as exhibits on industry.

By the end of the 18th century, the Upper Housatonic Valley was populated by cosmopolitan professional and mercantile leaders, farmers on marginal



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lands just getting by, a mix of religious sects (Congregationalists in the majority, with sects of Baptists, Methodists, Episcopal, African Methodist Episcopal, Quakers and Shakers), and a significant population of African Americans, both slave and free, and a dwindling group of Native Americans.

By the mid 18<sup>th</sup> century, the Valley's economy was diversifying. Colonel John Ashley's account books (after 1760s) mention a wide variety of local industries, including cider, grist, saw, plaster, fulling, and carding mills, a stone quarry, a bloomery forge, and a potash kiln. Each small industry had its own specialists such as ironmasters and millers and sawyers, aided by unskilled laborers and, in some cases, enslaved laborers. Production of iron traces some of its early American roots to the upper Housatonic Valley.

### Iron

Surveyors sent to the upper Housatonic Valley from Hartford and Boston to lay out the new townships noticed their magnetic compasses behaving erratically, revealing the presence of plentiful iron ore deposits. By 1731 John Pell and Ezekiel Ashley had discovered Ore Hill in Salisbury, the largest and richest deposit of what became known as Salisbury ore. These high quality deposits extended almost 100 miles southward along the Housatonic River so that virtually the entire Upper Housatonic Valley sat atop massive iron ore deposits. While these deposits provided the raw materials for an industry, other natural resources that were critical to the process were also found locally: wood for charcoal fuel; lime for flux; water power to drive hammers and bellows; and stone or marble for constructing the stacks and furnaces. The "iron rush" was on and it would last for almost 200 years.

In 1732, Thomas Lamb arrived from the Springfield area and purchased 5,000 acres and water rights along Salmon Fell Kill in Lime Rock. His workers mined ore on the property and transported it in bags slung over the backs of horses that walked more than four miles to the forge he had erected next to the river. Lamb began smelting ore at Lime Rock's Furnace Hollow in 1734. In 1739 Richard Seymour's

East Canaan forge began operation, and Joseph Skinner's forge at Sharon opened the following year. Kent and East Canaan were sites of new forges in 1744. Four years later, another forge was constructed at Salisbury. In another two years, John Gray began making iron on Sharon Mountain.

The early, small forges made good quality wrought iron, but each site could produce only about 400 pounds per day. (By comparison, the Beckley Furnace in 1847 produced eleven tons daily.) As demand increased for plows, cauldrons, ship anchors, and building hardware, the first blast furnace in the region opened at Salisbury in 1762, built by John Hazeltine, Samuel and Elisha Forbes, and Ethan Allen. During the American Revolution, the Salisbury Furnace made 75 to 80 percent of cannon for the colonies, earning the name "Arsenal of the Revolution." Following the Civil War, more advanced local iron works manufactured railroad car wheels. But by the end of the 19<sup>th</sup> century, Housatonic Valley iron works proved uncompetitive with the Midwestern iron and steel industry and those that used the more efficient Bessemer process. The Barnum and Richardson Company/Salisbury Iron Company held on until forced to declare bankruptcy in 1925.

Over time, there were 43 blast furnaces in the Salisbury Iron District: 22 in Massachusetts and 21 in Connecticut. In the process of building the iron industry, the Valley was so denuded of trees for making charcoal that there was often a shortage of fuel for winter heat. In 1850, 75 percent of the upper Housatonic Valley had been deforested; today, three-quarters of the deforested land has been reforested.

### Early Religion and Education in the Upper Housatonic Valley

In the Upper Housatonic valley region, Congregationalists were in the majority. By 1790, they were joined by Methodists, Baptists and later Universalists. Church-led missionary societies promoted good morals and Sabbath-honoring.

In 1734, the Mohicans requested a missionary to serve their settlements on the banks of the Housatonic. Yale graduate John Sergeant was called

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and, within several months, chartered the Indian Town of Stockbridge. During Sergeant's fifteen years at Stockbridge and after the Indian leader John Konkapot's baptism, tribe membership grew four-fold—from 50 to over 200—and Sergeant baptized over half of them. In 1739, Sergeant married Abigail Williams and built a permanent home called the Mission House for her. Jonathan Edwards became the second missionary to serve the Stockbridge Indians in 1750. Today, the Mission House is operated by The Trustees of the Reservations and is a National Historic Landmark. It was moved from its original site.

Ultimately, the English dealt the Indians out of their land. A second attempt to "rescue" the Mohicans began in 1749 when Moravian missionaries from Pennsylvania arrived in the Sharon Valley intent on the salvation of the remaining and dislocated group of Mohican and Mattabesic. What the Moravians reportedly found was not a tribe at all, but rather a disorganized refuge for Native Americans who had been driven off their land and hunting grounds. The Moravians worked with Native Americans for five years until the outbreak of the French and Indian Wars.

Some Europeans looked to America as the ideal place to establish utopian communities. The Shakers established a strong presence in Connecticut, Massachusetts, and New York beginning in 1783. The United Society of Believers in Christ's Second Appearing was founded by Mother Ann Lee in Manchester, England, in 1747. She was regarded as the female manifestation of Christ, and followers held that Christ had both male and female qualities. Most of the early English members were dissenting Quakers. Like the Quakers, the Shakers were pacifists who disdained judgmental activities. However, Shakers believed in individual revelations, visions, prophesy trances, and ecstatic dancing. In order to practice their beliefs, the Shakers eschewed urban society and the corruption of cities. The principal Shaker tenets were virgin purity, Christian communalism, confession of sin, and separation from the world.

A total of 19 Shaker communities were established from Maine to Kentucky, including those in Tyngham and Hancock (established 1780s), on the

outskirts of Pittsfield. Today, Hancock Shaker Village survives as a National Historic Landmark and a living history museum. Its 1826 round stone barn (which supported a thriving dairy industry), communal dwellings, crafts shops, and meeting house remind visitors of the influence that Shaker culture and design has had on American craft. Shaker beliefs resonate in their oft-repeated advice: "Do your work as though you had a thousand years to live and as if you were to die tomorrow."

Valley residents were committed to education. Both Connecticut and Massachusetts claim to have established the first free public schools in America. At first, elementary level schooling was a matter for the home and the church. But as populations and town governments grew, the responsibility to provide tax-based, free education fell to elected school committees. (As early as 1642, Massachusetts law authorized towns to require universal literacy.) Higher education—generally steeped in religion—became increasingly important.

Today, with a population of about 110,000, the Upper Housatonic Valley has an exceptional variety well-known colleges and universities within and just outside its borders. Within the boundaries, there are two vigorous community institutions: Berkshire Community College in Pittsfield and Great Barrington, founded in 1960; and Bard College at Simon's Rock founded in Great Barrington in 1964. America's first law school, the Litchfield Law School, was established in Litchfield, Connecticut, just outside the upper Housatonic Valley in 1773 by Tapping Reeve. Although it closed in 1883, the school was the alma mater of two United States Vice Presidents, 101 members of the U.S. House of Representatives, six Cabinet Secretaries, three Supreme Court Justices, fourteen state governors and thirteen state Supreme Court Chief Justices. The Tapping Reeve House, where most law lectures were held, is a National Historic Landmark.

All of this activity called for roads linking established towns. Colonial governments promoted road construction to encourage economic development and to enable military transport. Most were built along Native American trails that criss-crossed the

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valley along the easiest topographical routes. The first public road in the Upper Housatonic Valley opened in 1735 between Sheffield and Westfield, Massachusetts. Two decades earlier, “post roads” between Boston and New York were opened through Connecticut. Anna and Silas Bingham opened a general store and tavern in Stockbridge in 1799 with eight rooms for travelers. After it burned to the ground, it was rebuilt as the Stockbridge Inn in 1900, and today operates as the Red Lion Inn.

Several obstacles discouraged rapid colonization of the Upper Housatonic Valley from the late 1600s to the early 1700s. Two of these obstacles were physical: the Taconic Mountains prevented easy access from the Hudson River Valley to the west and the Berkshires and the Litchfield Hills deterred migration from the east and south. In addition, the rocky, forested land was inhospitable to agriculture. While local economies were mostly subsistent, trade among the towns grew along the rutted colony roads and “post roads.”

Yet another obstacle was political. French explorers and settlers had made early allies of some Native American tribes which they enlisted to help defeat the English and the Dutch for absolute control of North America. Although a few Dutch settlers began entering the Upper Housatonic Valley as early as the 1690s—and English colonists arrived by the 1720s—there was fear of brutal hostilities. Victory in the French and Indian War (or, more precisely, wars) would have to be achieved prior to the American Revolution. In fact, England and France engaged in four wars in North America between 1689 and 1759, collectively known as the French and Indian Wars after Great Britain’s two greatest enemies. The Wars was a global conflict with religious overtones, as Protestant forces of the Reformation (primarily England and the colonies) were pitted against those of Catholicism (principally France and Spain). The American theaters included military actions in New England: King William’s War began in 1689 and lasted until 1697; Queen Anne’s War raged from 1701 to 1713; Dummer’s War skirmishes erupted between 1721 to 1725; and King George’s War lasted from 1744 until 1748 and included the destruction of Saratoga, New York.

By early 1750 there were as many as 60 French fortifications in North America. Not only were the colonists alarmed, but the Crown decided that the time had come to oust the French from North America. Massachusetts native Robert Rogers formed “Roger’s Rangers” and fought with Mohicans on behalf of the Crown on several fronts, perfecting winter battle on snowshoes and serving as the forerunner to the special services squads of later American, Canadian, and British armed forces units. Meanwhile, British-born Jeffery Amherst, later to become Governor General of British North America, carved a crude roadway across the Berkshires to fight the French at Crown Point, New York. Henry Knox later used this same roadway—essentially today’s Route 23—to deliver cannon to Boston from Fort Ticonderoga. Great Britain prevailed after a decisive September 1759 battle on the Plains of Abraham in Québec City, in which two brilliant commanders, England’s James Wolfe and France’s Louis de Montcalm, were killed. New England—and the Housatonic Valley—was “English” again—for a short while.

By the early 1760s, when the French and Indian Wars were over, it seemed that peace and safety were secure. As the New England colonies began to suffer the financial burdens imposed by the British Crown to pay for the costly wars in North America, they protested the restrictive policies.

The Upper Housatonic Valley absorbed, directly and indirectly, the economic impact of Great Britain’s increasingly restrictive trade rules. For example:

- The 1750 Iron Act limited growth of the iron industry by requiring that all pig iron be shipped to Great Britain and returned as finished goods to be sold to the colonists.
- In 1774 the Coercive Acts (dubbed the “Intolerable Acts” in the colonies) required Massachusetts to pay for all goods and taxes lost during the 1773 Boston Tea Party. Britain installed a royal governor for the Massachusetts colony.
- The 1774 Québec Act centralized all colonial governments in Canada and extended the southern boundary of Canada into land claimed



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by both Massachusetts and Connecticut—notably, Connecticut’s “Western Reserve” in the Ohio Valley.

Colonists resented the acts and resisted those they could. Interspersed with the decrees, taxes and acts from abroad, the colonies escalated their resistance to the Crown and Parliament, beginning with the casual but persistent harassment of British troops. Colonists organized formal Committees of Correspondence to plan common action against Great Britain in 1772. Within two years, about a hundred committees had been formed in Massachusetts. Connecticut replicated the Committees in 1773, and similar committees sprang up in all thirteen colonies, totaling 300 by 1774.

Committees of Correspondence were the first official political union among the colonists. They published and disseminated findings—grievances, proclamations, actions—not only among themselves but also with foreign governments. Ireland was the first to hear of the colonists’ complaints and set up its own Committee of Correspondence to report back to the colonies; Spain and Holland followed.

In the Upper Housatonic Valley, Sheffield’s Committee of Correspondence endorsed the Sheffield Resolves (also known as the Sheffield Declaration) on January 12, 1773. Historians speculate that Theodore Sedgwick wrote the Resolves in a second floor study of the Col. John Ashley House. It stated that:

Whereas the Parliament of Great Britain have of late undertaken to give and grant away our money without our knowledge or consent... we will not import, purchase or consume [any British goods].

On November 1, 1765, George III’s Stamp Act went into effect. Parliament specified that every document printed on paper carry a “stamp” showing that yet another tax had been paid to London. Quite possibly the very first act of defiance in the colonies was a February 1766 Litchfield County resolution asserting “that the Stamp Act was unconstitutional, null and void, and that business of all kinds should go on as usual.”

After the Boston Massacre in 1770, two regiments of resistance formed in Berkshire County with at least one other in Litchfield County. When the port of Boston was closed in 1774 Committees of Correspondence gathered more often. Regiment members became Minutemen, and a system of express riders was established to transmit information and ideas. In July 1774, a Berkshire County convention met at the Stockbridge House to adopt—and enforce—the first absolute prohibition of relationships with Great Britain. Many call this the first “Declaration of Independence.” One month later, over a thousand Berkshire residents and some five hundred from Litchfield gathered at the county court house in Great Barrington, occupying it and refusing to let the British-appointed judges sit. General Gage in Boston sent a letter to London stating that “a flame sprang up in the extremity of the Province. The popular rage is very high in Berkshire and makes its way rapidly to the East.” Today, a marker on the Town Hall lawn in Great Barrington reads:

Near this spot stood the first court house of Berkshire County, erected 1764. Here, August 16, 1774, occurred the first open resistance to British rule in America.

Following the “shot heard ‘round the world” at Lexington in 1775, Boston came under siege, surrounded by a militia of more than 15,000 patriots from Massachusetts, Connecticut, New Hampshire, and Rhode Island. Unlike the so-called “Powder Alarm” in Somerville six months earlier, this time the reports of Patriot deaths and bloodshed were true. The Revolutionary War had begun, and the Siege of Boston lasted for almost a year—from April 19, 1775 until March 17, 1776. The new Continental Army grew with eager recruits from New England and all thirteen colonies. On April 22, 1775, 496 new members of the Continental Army started the march to Boston from Lenox and Pittsfield. George Washington took command of the Patriot forces and sent the 7th and 8th companies of Putnam’s 3rd Connecticut Regiment to fight in the Siege of Boston and the Battle of Bunker Hill. He also dispatched the 13th, 14<sup>th</sup>, and 15th Regiments of Connecticut Militia (from

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Litchfield County and surrounding areas in northwest Connecticut) to fight in New Jersey, New York and, perhaps, Pennsylvania.

On May 3, 1775, the Massachusetts Provincial Congress authorized Benedict Arnold to gather forces for an assault on the British-held Fort Ticonderoga. In less than one week, Arnold was joined by Litchfield-native Ethan Allen's "Green Mountain Boys" and the 13th Connecticut Regiment. On May 9, 1775, they captured the heavily fortified but lightly defended Fort Ticonderoga and Fort Crown Point. More than 180 cannon (some likely produced in the Salisbury Iron District) were left behind.

In November 1775, Washington dispatched a young bookseller and aide named Henry Knox to bring this heavy artillery to Boston. By February, 1776, Knox and his crew of engineers and teamsters had hauled more than 60 tons of artillery across the frozen Hudson River, through a rugged expanse of what are now Alford, Egremont, Great Barrington, Monterey, Sandisfield and Otis in Berkshire County and across the frozen Connecticut River to Boston. This armament was decisive in ending the longest single conflict of the Revolutionary War. By March 1776, Knox's artillery was used to fortify Dorchester Heights and threaten all British supply lines. British commander William Howe realized that he could not continue the Siege and evacuated Boston, withdrawing his troops to Halifax, Nova Scotia, on March 17. In the late 1920s, New York state and Massachusetts jointly established the first heritage trail in the United States, placing bronze-on-stone markers the length of Knox's trek, from Ticonderoga to Dorchester Heights, including five in Berkshire County.

Upper Housatonic Valley patriots also participated in the Battle of Bennington, where the Green Mountain Boys surprised and defeated a regiment sent by British General John Burgoyne to raid the area for supplies and horses. The battle proved significant—Burgoyne lost 1,000 men and the support of his Native American allies—for it disrupted his plans to cut New England off from the rest of the country by capturing the Hudson River Valley. In September and October, 1777, British General Burgoyne,

outnumbered three to one, surrendered his entire army of 6,000 regulars at the Battle of Saratoga. All 6,000 British survivors were marched east, through the Berkshires and the Litchfield Hills to Boston and sent back to Great Britain. This defeat encouraged France to enter the American Revolution on the side of the Patriots, globalizing the conflict.

"Bett" was born enslaved to Pieter Hooageboom in Claverack, New York, in 1742. As a child, Bett and her sister became the property of Col. John Ashley of Sheffield, Massachusetts, when he married Hooageboom's daughter, Hannah. Four other slaves lived and worked in the household. Frequent guests were Colonel Theodore Sedgwick and Tapping Reeve, who helped formulate the concepts and details of the Commonwealth's first constitution.

Based in part on Col. John Ashley's 1773 Sheffield Resolves, the Massachusetts Constitution was adopted in 1780. Article 1 reads:

All men are born free and equal, and have certain natural, essential, and unalienable rights; among which may be reckoned the right of enjoying and defending their lives and liberties; that of acquiring, possessing, and protecting property; in fine, that of seeking and obtaining their safety and happiness.

Bett likely heard these words either from John Ashley himself or other patriots who gathered at the Ashley House. She reasoned that these words applied to her as well.

Reputedly (as told by Catharine Sedgwick years later), an angry incident in 1780 between Bett and Hannah Ashley changed the course of human freedom in Massachusetts. Known for her quick temper, Hannah Ashley attempted to strike a household slave with a "hot shovel." Bett intervened and Hannah struck Bett who immediately left the Ashley House and refused to return. She sought help from Colonel Sedgwick, a lawyer, who approached Tapping Reeve who had recently established America's first law school in Litchfield. Their 1781 lawsuit on Bett's behalf before the County Court of Common Pleas in Great

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Barrington resulted in an award to Bett for compensation for her work from the age of 21 onward and her freedom on the basis that slavery was illegal under the newly ratified Massachusetts Constitution. Ashley was fined 30 shillings and court costs. Bett, who changed her name to Elizabeth Freeman, went on to work as a free woman and domestic in Theodore Sedgwick's Stockbridge home where the Sedgwick children called her "Mum Bett." After her death in 1829, she was buried in the "Sedgwick Pie," a circular section of the Stockbridge cemetery where Sedgwick family members are buried in wedge-shaped plots that form a large circle (hence the pie) around the patriarch Theodore Sedgwick. Freeman is the only non-family member interred there. Freeman is quoted as saying:

Any time, any time while I was a slave, if one minute's freedom had been offered to me, and I had been told I must die at the end of that minute, I would have taken it— just to stand one minute on god' airth a free woman—I would.

After Freeman's trial, and other similar court cases, on July 8, 1783, the Supreme Court of Massachusetts effectively abolished slavery in the Commonwealth. The Fugitive Slave Act of 1793 gave rise to the beginning of the Underground Railroad. Indeed, there is evidence in the Ashley account books that the Ashley Falls section of Sheffield assisted slaves in the early 1800s while Connecticut was in the process of gradual emancipation.

The Upper Housatonic Valley's African American Heritage Trail celebrates Elizabeth Freeman and other pioneering Black freedom activists.

One last uprising sometimes called the "final battle of the Revolutionary War"—Shays' Rebellion—took place in central and western Massachusetts between August, 1786 and February, 1787. After the Revolution, European creditors began demanding repayment of loans made to the new nation to finance the War; in turn, government entities passed the obligations onto the people. Many patriots were not paid for their war service or received nearly worthless

script. As Patriots returned home after the Revolution, many discovered that their personal debts exceeded their ability to pay. Common practice at the time was a court order to seize personal property—homes, farms, livestock—and sentence debtors, like Daniel Shays, to prison. From debtor's prison, Daniel Shays enlisted men (and women) to the cause of the regulators: if you fought for political liberty, you were entitled to economic liberty too.

Once released, Shays relied on the same methods to recruit supporters that worked before the Revolution, including publishing pamphlets and attacking court-houses to interrupt court proceedings on foreclosures. On September 12, 1786, an armed mob appeared at the Court of Common Pleas in Great Barrington and forced the release of all inmates in the debtor's prison. Alarmed, wealthy Bostonians hired at least 3,000 soldiers. Many former Revolutionaries, including Samuel Adams, advocated execution of the Shaysites.

On January 25, 1787, Shays and about 1,800 Regulators besieged the Springfield Armory which was protected by 1,100 state troops. Five Shaysites were killed and the rest scattered as far away as New York and Vermont. By January 27 at least 4,400 state troops had arrived and skirmishes ensued in Great Barrington, Pittsfield, Sheffield, Stockbridge, and Lenox. The Regulators' tactics were fear and plunder. On February 26, regulators stumbled onto the Colonel Theodore Sedgwick mansion in Stockbridge where they were met by Elizabeth Freeman. Although the Sedgwick papers and valuables had been secured in an iron chest in Bett's attic room, she taunted them by saying, "Oh you had better search this! An old nigger's chest! You are such gentlemen!"

In short order, General John Ashley arrested 90 rebels in Egremont; three were killed and thirty were wounded. Approximately 800 Shaysites were captured and jailed in Great Barrington and Lenox; two were put to death by hanging. The final—and most brutal—battle in Shay's Rebellion took place in Sheffield on February 27, 1787. A stone monument marks the spot and the Appalachian Trail passes by it.

Hearing of the Shaysites while serving as ambassador



## APPENDIX 5 *continued*

to France, Thomas Jefferson commented, “a little rebellion now and then is a good thing. The tree of liberty must be refreshed from time to time with the blood of patriots and tyrants.” Shays’s Rebellion caused the next Continental Congress to revise the Articles of Confederation and enact laws that protected both the Union and the individual in matters of personal property. The Rebellion is also credited with originating provisions later included in the Bill of Rights, enacted in 1791.

As the nineteenth century dawned, agriculture remained central to life in western New England. However, more fertile farmland west of the Appalachians and transportation efficiencies occasioned by the Erie Canal, which opened in 1825, contributed to its decline. With the onset of the Industrial Revolution, farms—particularly in the stony uplands—were abandoned as settlers relocated near factory jobs or migrated west. This trend continued into the late 1800s, although there was at least one attempt to counter the exodus. Maurice de Hirsch, a wealthy Bavarian banker, worked through the Jewish Agricultural and Industrial Aid Society to relocate inner city Jews to the Valley countryside, where many began chicken farms or took in summer boarders.

By the Civil War, dairying replaced sheep farming as railroads opened new markets for milk, butter, and cheese. Farmers formed Patrons of Husbandry units to exchange information and socialize. They held occasional autumn fairs beginning in 1771 in Great Barrington and established the Housatonic Agricultural Society’s cattle show in 1841. The fair included lectures on scientific farming and competitions among agricultural equipment makers. Other valley men turned to developing industry.

With its natural north-south orientation and mountain barriers to east and west, the Upper Housatonic Valley was geographically isolated from Boston, Hartford, and Albany and so aligned with New York City to the south. Small-scale, niche industries suited a class of self-reliant innovators who used the Housatonic River and its many tributaries for water power and the forests for wood that could be pulped for paper making or burned for charcoal to fuel the iron-working furnaces.

Industries, like iron and paper, that took hold in the eighteenth and early nineteenth centuries, thrived into the early years of the twentieth century.

Massachusetts supported gristmills, sawmills, glass-works, marble and lime quarrying, potash production, and paper and textile manufacturing. The increased capacity of Connecticut’s blast furnaces allowed the smelting industry to grow. The Lenox Iron Works had processed bullets for the Revolutionary War, and Lemuel Pomeroy’s Pittsfield gun making shop supplied muskets for the War of 1812. Farm implements—the iron plough (developed in 1814), wagon wheels, carriage springs—and other hand-wrought and mass produced items led to prosperity for numerous smiths, mechanics, and mill owners throughout the Upper Housatonic Valley.

### **Paper and Woolens**

By the early 1800s, the pure, soft artesian water of the Housatonic River attracted paper making to the Upper Housatonic Valley. In 1770, Stephen Crane opened the Liberty Paper Mill in Milton, Massachusetts. Crane sold paper to Paul Revere, who engraved early colonial currency. Crane’s son, Zenas, set out to find a suitable western Massachusetts location for a paper mill. He chose Dalton on the Housatonic for its resources: plentiful pure water; a supply of cotton ginning wastes, linen, flax and other textile cuttings; and labor.

Zenas Crane, Henry Wiswell, and John Willard inaugurated paper making in the Upper Housatonic Valley in 1801, founding the oldest, continuously operating paper mill in North America. Competitors entered the business by 1806, and paper mills were established in Lee (the Willow Mill), Great Barrington, Lenox, Stockbridge, and Salisbury. Just before the Civil War, there were as many as 47 paper mills in the Upper Housatonic Valley. Lee became the largest “paper town” in the United States and later Lee mills would supply newsprint for *The New York Times* and other papers. By the 1820s, the partially mechanized “cylinder” mesh began to replace the hand framing process, thereby doubling production. In 1822, Zenas Crane bought out his partners for \$6,500.

## APPENDIX 5 *continued*

In 1844 Crane patented banknote papers embedded with silk threads to thwart counterfeiters and increase durability. By 1850 a reliable postal system increased interest in business and social correspondence and so envelopes and stationery went into production along with fine, long-lasting papers for proclamations, permanent public records, and stock and bond certificates. Winthrop Crane won the hotly contested contract for exclusive rights to produce currency paper for the Bureau of Engraving and Printing in 1879—a contract which Crane still holds today. Between 1860 and 1880, Crane made paper collars for menswear as well as a growing line of paper for writing and packaging, increasing its payroll from 55 employees to over 500. On Crane’s centennial, it operated seven mills and employed over 950 people. The Old Stone Mill in Dalton, opened as a museum of paper making in 1930, is on the National Register of Historic Places, as is the Rising Paper Mill which was built in 1876 in Great Barrington.

Meanwhile, Pittsfield was emerging as a center for woolen manufacture. Entrepreneur Arthur Scholfield, who arrived in 1800, introduced the first carding machine and later opened a woolen mill. He perfected looms and spinning jennies and introduced the first broadcloth for sale in the U.S. in 1804. In 1807 Merino sheep, whose fleece offers a uniformity that lends itself to factory production, were introduced to the region from Spain. A year later, Scholfield produced the first Merino wool broadcloth and presented it to James Madison who wore a suit made from the materials to his inauguration. Wool and broadloom prices—and the sheep population—soared, although all would be subject to boom-bust cycles. Successive waves of immigrants, including Irish and French-Canadians moved to the region to work in the trade. Both Massachusetts and Connecticut boasted of being centers of American woolen manufacturing but eventually the trade waned. After making army blankets during World War II, the last woolen mill closed its doors in the 1950s.

### Intellectual Growth

The Upper Housatonic Valley became an early center of education and intellectual vigor, especially

Williamstown (just north of the Heritage Area), Lenox, and Litchfield. In Williamstown, Williams College built the Hopkins Observatory in 1836, which is the oldest existing observatory in the United States and is still used as a planetarium. Lenox Academy was a highly regarded private school from 1803 to 1866.

The great Calvinist preacher Lyman Beecher served the Congregational Church of Litchfield for sixteen years while he and his wife raised thirteen children, among them: Catherine, an early proponent of women’s education; Charles, who was Superintendent of Public Instruction in Florida; Isabella, a champion of women’s legal rights; Congregational minister Henry Ward Beecher; and Harriet Beecher Stowe whose *Uncle Tom’s Cabin* became a best seller just before the Civil War. Berkshire Medical College operated in Pittsfield for more than four decades beginning in the 1820s. The Cornwall (CT) Mission School (1817 to 1827) had as its purpose to bring Christianity and western culture to non-Caucasian people by educating people of their own culture as missionaries. Native Hawaiians, Hindus, and Native Americans were among the students.

Just south of the National Heritage Area, The Litchfield Female Academy was established in 1792 by educator Sarah Pierce. Over forty years, she helped educate more than two thousand young women from fifteen states and territories, Canada, Ireland, and the Caribbean. Pierce knew that the “ornamental subjects” were essential to attracting the support of those families able to afford higher education for their daughters. But Pierce also firmly believed that, with an education, women were the intellectual equals of men. She offered a strong academic curriculum that included logic, chemistry, botany, and mathematics. She was also far ahead of her time in working to unite academics and ornamental subjects. At least two of the Beecher sisters, Catherine and Harriet, attended Litchfield Female Academy and both carried forward that school’s beliefs in Christian behavior, education, and work for the betterment of mankind in the wider world.

Litchfield was also home to the Litchfield Law School—the first in the nation. Founded in 1784, it admitted only

## APPENDIX 5 *continued*

young men. These two schools in one town stimulated an intellectual environment along with an active social calendar. Law student William Ennis described the social atmosphere to his friend Horace Mann in 1821: “There are ladies in abundance who are monopolized by the students.... In short no man can regret the fate which renders him an inhabitant of Litchfield.” Mann began his studies at Litchfield Law School the next year. While both schools closed in the 1830s, they were pioneers in combining intellectual curiosity with cultural refinement.

Born in Stockbridge, novelist Catharine Maria Sedgwick (1789-1867) was a daughter Theodore Sedgwick. In 1831 she moved to Lenox where she wrote moral tracts, eight novels, and over one hundred stories for adults and children in a style now known as domestic fiction. Her local settings and details of New England life were considered accurate and helped found a uniquely American school of literature. She became renowned for her tea parties in which she gathered leading American writers, including Herman Melville, Nathaniel Hawthorne, and Ralph Waldo Emerson. She was an early advocate for education for women, especially for the purpose of raising sons with a sense of civic duty essential for the success of the new republic. She promoted religious tolerance and social and political causes such as improvements in prisons and racial justice. Today, her writings are considered ambivalent. Although opposed to slavery, she thought the abolitionists too extreme in their views. While she supported women’s right to own property, she did not support women’s right to vote.

Nathaniel Hawthorne visited the area as early as 1835 and later brought his family to live in Lenox. In 1850, Hawthorne had favorably reviewed Herman Melville’s *Typee* for a national audience, and Melville was preparing to write a very positive review of Hawthorne’s *Mosses from an Old Manse*. The two met when they were part of a small group invited by politician and reformer David Dudley Field II for a climb up and picnic atop Monument Mountain in Great Barrington. A close personal relationship between Hawthorne and Melville soon developed. By 1850, Oliver Wendell

Holmes, Sr., and James Russell Lowell established homes in the upper Housatonic Valley.

Paved town roads and regular stagecoach service—and later still, easy railroad service from Boston and New York City—brought even more artists to the Upper Housatonic Valley. The Valley proved enticing to urban residents who appreciated its rustic reforested beauty. The Western Railroad to West Stockbridge opened in 1838, and in 1841 a north-south rail line connected North Canaan and West Stockbridge. Nine years later, Great Barrington, Stockbridge and Lee were connected. The trickle of artists became a steady flow, and soon patrons followed. As the valley’s fame spread, ordinary tourists started to enjoy the Upper Housatonic Valley.

Many of the leading Massachusetts gentry owned slaves before it was abolished in 1783, two years after Elizabeth Freeman’s court victory over John Ashley. In 1790, in Berkshire County the African American population numbered 300 (3%) out of a total population of 30,000. Connecticut passed several antislavery laws between 1784 and 1797 in a policy of gradual emancipation, calling for enslaved persons born before or during the waiting periods for manumission to remain in slavery until they were adults. By 1820, there were 97 enslaved persons in Connecticut and 25 a decade later. By 1840, 17 people were still enslaved.

James Mars, born enslaved in New Canaan in 1790, was indentured until age 25. From 1815 to 1845 he worked as an independent farmer and laborer in Hartford before moving to Pittsfield. In 1864, he published *Life of James Mars, a Slave Born and Sold in Connecticut*.

The white Burghardt family brought black slaves to Great Barrington from New York. One named Jack, who reportedly received his freedom in payment for service during the Revolutionary War, was an ancestor of scholar and activist W.E.B. Du Bois who was born in Great Barrington in 1868. During Du Bois’s youth in Great Barrington in the 1870s and 1880s, there were 107 people classed as “native blacks” in town out of a population of 4,471. That population was comprised of Blacks free since the American Revolution, ex-slaves



## APPENDIX 5 *continued*

from the South, and domestic servants who had come to town with their wealthy employers.

Du Bois was the first African American to earn a Ph.D. from Harvard (his dissertation was on the African slave trade). He instigated the Niagara Movement in 1905 to oppose racial segregation and discrimination, and he helped found the National Association for the Advancement of Colored People, serving as the editor of the NAACP's magazine *The Crisis*. Du Bois frequently visited his hometown to restore his grandparents' homestead.

Great Barrington was also the summer home of James Weldon Johnson, a poet and chronicler of the Harlem Renaissance, best known for writing the words to the song "Lift Ev'ry Voice and Sing," which has been called the black national anthem. Ulysses Franklin Grant, the great baseball player, grew up in Williamstown and played in games in Pittsfield. Lenox was the childhood home of James VanDerZee, the photographer known for his documentation of the Harlem Renaissance.

Many white citizens in the upper Housatonic valley were active in the fight to abolish slavery. For example, several members of the Beecher family wrote and spoke to national audiences and writer William Cullen Bryant, later the editor of the *New York Post*, was born in Cummington, Massachusetts, and practiced law in Great Barrington. Writer Catharine Maria Sedgwick was reared by Elizabeth Freeman (Mum Bett). Housatonic Heritage's African American Heritage Trail identifies eleven "Alleged Underground Railroad Stations" in Massachusetts from Sheffield extending north to Lanesboro. Although it is difficult to document such sites, many prominent citizens are believed to have helped slaves move from one safe house station to another, including Colonel Jared Bradley, Dr. John Milton Brewster, Zenas Crane, and Dr. Henry L. Sabin.

By the mid-1820s the Upper Housatonic Valley's character was taking shape as a forward-looking, self-reliant region confident in fundamental principles like self-governance, education, mutual respect, hard work, progressive attitudes, while also meeting the challenges of changing times and accepting

new opportunities. That character served the towns and villages of the Upper Housatonic Valley well as national attention remained focused regional divides during the next decades.

Beginning in the 1830s, abolition was at the center of the national dialogue. Massachusetts native William Lloyd Garrison began publishing his abolitionist newspaper *The Liberator* in 1831, and he founded the American Anti-Slavery Society in 1833. In the Upper Housatonic Valley, William Cullen Bryant studied at Williams College and practiced law for nine years in Great Barrington before becoming a crusading editor at the *New York Post* in 1825, where he served for fifty years. During the 1850s he was one of the most influential public figures in the abolitionist movement and played an important role in bringing Lincoln to the public eye and, ultimately, the presidency. Berkshire County natives Henry Ward Beecher, Harriet Beecher Stowe, and Catharine Sedgwick spoke and wrote passionately against slavery.

In Pittsfield, the Rev. Samuel Harrison sounded an influential African American voice for equality. Harrison was born enslaved in 1818, but by 1850 he had become the first minister of the Second Congregational Church of Pittsfield, Berkshire County's earliest black church. In 1863 Harrison was named chaplain of the newly formed 54th Massachusetts Regiment, the infantry division that saw extensive service in the Civil War. An ardent abolitionist and a writer and speaker of national importance, Harrison protested discriminatory pay practices in this regiment and won. Harrison's life and times—along with those of Mum Bett and W.E.B. Du Bois—represent a key theme explored by Housatonic Heritage's African American Heritage Trail. Harrison's legacy is preserved through the Samuel Harrison Society.

In the Upper Housatonic Valley, the turmoil over slavery played out against a background of steady growth and comfortable life for both residents and visitors. The Curtis Hotel opened in Lenox in 1834 to serve a growing number of tourists. The Merrell Inn, a stagecoach tavern in Lee, and other hotels and guest-houses in Stockbridge—especially the Stockbridge House—Great Barrington, and neighboring towns

## APPENDIX 5 *continued*

also welcomed tourists and regular guests for short or long visits. Travelers arrived from New York and, especially after the railroad crossed the mountains in 1838, from Boston, Hartford, Albany, and other eastern cities.

Along with travelers came new residents. The Upper Housatonic Valley's population continued to increase, driving the need for new places to worship especially as the region saw greater ethnic and religious diversity. The First Congregational Church in Lee built a new structure in 1851. The church's wooden steeple—the tallest in New England—contained one of only two Seth Thomas steeple clocks made. In 1857 the congregation of St. James Episcopal Church in Great Barrington moved into its new, larger church built of blue limestone, with stained glass windows containing slag from the area's blast furnaces. The first Catholic Church in the region, St. Joseph's in Pittsfield, opened in 1844 to serve a wave of Irish immigrants driven from their homeland by the Potato Famine. The first Jewish immigrants arrived in the 1840s; the first synagogue, Society Anshe Amunim (Men of Faith) was established in Pittsfield in 1869. Immigrants from all over were lured by the promise of work in the paper mills, textile mills, and forges as well as opportunities to become entrepreneurs.

The Laurel Hill Association was founded in Stockbridge in 1853 for the purpose of the beautification of the village center. The association removed weeds, planted trees, installed lamps, laid sidewalks, and made park-like public spaces. Its efforts encouraged summer tourism and summer residency of wealthy individuals.

Concomitant with an awareness of gentrified street-scapes, was an early appreciation of local history. A preservation movement followed. In 1829, the Rev. Dudley Field, father of Cyrus Field, published his *History of the County of Berkshire*, and fifteen years later he wrote the first history of Pittsfield. Today, there may be as many as 200 museums and local historical societies in the Upper Housatonic Valley.

The 1840s and 1850s marked the beginning of the "Berkshire Cottage" movement. Boston financier

Samuel Gray Ward erected the first cottage, called "Highwood," in Stockbridge in 1845 designed by Richard Upjohn; it is now part of Tanglewood. Established authors were discovering the region's serenity as an idyllic location for work:

- Long-time visitor and actress Fanny Kemble bought The Perch in Lenox in 1850 to be closer to her long-time friend Catharine Maria Sedgwick;
- In 1850, Nathaniel Hawthorne moved to Lenox (Stockbridge, really, although he considered himself a resident of Lenox). During the eighteen months Hawthorne spent in the Upper Housatonic Valley, he wrote *The House of the Seven Gables*, the short-story collection *Twice-Told Tales* and began *Blythwood Romance* and *Tanglewood Tales*. The latter two were thought to have been inspired by the Berkshires.
- Herman Melville first visited his uncle's Pittsfield farm in 1832 where he is thought to have spent many happy hours working the farm and hiking the land. In the summer of 1850 he met Hawthorne and Oliver Wendell Holmes, Sr. (Holmes' family was from Pittsfield). Following Hawthorne's example, Melville moved to the Berkshires with his family and within one week purchased the farm next to his uncle. He named the farm Arrowhead after the native relics he discovered while plowing the fields. Melville lived at Arrowhead for the next thirteen years and wrote some of his finest works there. His short story, "The Piazza," begins at Arrowhead and takes a magical journey to the Mount Greylock, to which he dedicated his novel, *Pierre*. According to the Berkshire Historical Society, "The view of Mount Greylock from his study window, the one that brought him to Arrowhead... [inspired] the white whale in *Moby-Dick*." Melville wrote: "I have a sort of sea feeling here in the country, now that the ground is all covered with snow. I look out of my window in the morning when I rise as I would out of a port-hole of a ship in the Atlantic. My room seems a ship's cabin; & at night when I

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wake up & hear the wind shrieking, I almost fancy there is too much sail on the house.”

- Henry Wadsworth Longfellow, whose wife was a Pittsfield native, spent time in the area.

### **New Technology, New Applications**

Thanks to the Upper Housatonic Valley’s Merino sheep and plentiful immigrant labor from Ireland and Central Europe, large-scale woolen manufacturing allowed such factories as the Arnold Print Works in North Adams to keep Union soldiers clothed. For the first time, iron was used to clad ships’ hulls, including the Monitor (her steel plating was forged in North Adams) and the Merrimack who would meet for their historic battle in 1862.

Existing infrastructure, including well-maintained toll roads, a growing railway system, and a trans-continental network of telegraph lines, helped the Union Army transport troops and supplies and share information in real time. These Civil War-era innovations were easily exploited in its aftermath. The first telephone was demonstrated in Pittsfield in the mid-1870s. New institutions were established throughout the Upper Housatonic Valley: in Pittsfield, the House of Mercy Hospital opened in 1874, providing “care for the sick and disabled, whether in indigent circumstances or not.”

### **Electricity**

The late 1800s were a robust time for electrical experimentation and innovation in Europe and in the United States. Small direct-current power plants came into use to power industry, streetlights, and some city homes. But direct-current had a major limitation: it could not easily be transmitted over great distances.

William Stanley, a self-taught electrical engineer with family ties in Great Barrington, joined George Westinghouse’s staff and persuaded him to import a Gaulard-Gibbs alternator. Under contract to Westinghouse, Stanley, who suffered early stages of tuberculosis, took his family to Great Barrington in late 1885. He leased an old rubberware factory and, with the help of Louis Jenkins and Reginald Belafield, converted it into a laboratory where they

built over two dozen transformers. Stanley’s men ran #8 wires to Main Street, not to power streetlights (Great Barrington already had streetlights powered by coal gas) but to power light fixtures in storefronts, offices, and a few homes. The system made its official demonstration on March 20, 1886. Stanley said, “The plant was operated every night the engine felt like it from April 6 to June 16, when an attendant dropped a screwdriver in the alternator and wrecked it.” He applied to the Patent Office and on September 21 1886, he received Patent 349,611 for his induction coil, better known as a transformer.

A fascinating footnote to this story concerns Kellogg Terrace, an estate built by Mary Frances Hopkins, widow of Central Pacific railroad tycoon Mark Hopkins. Her construction contractor, H.N. Bodwell, installed a direct-current power plant in the mansion and, finding surplus power, ran wires up Main Street. The direct current power first switched on March 10, 1886, ten days before Stanley’s alternating current. When both were in operation, Great Barrington was the first town in the world to witness the operation of both systems. Observers saw no difference in the quality of the electricity sources. Obviously, Stanley’s system prevailed, and as George Westinghouse went on to manufacture alternating current equipment, and the battle with Thomas Edison over the superiority of AC or DC was won by Stanley. He continued his experiments and eventually relocated to Pittsfield where he established his own manufacturing plant.

Later, William Stanley worked with John Kelley and Cummings Chesney to develop the SKC transformer and, in 1893, installed one in a new power station built on the Housatonic River in Stockbridge at the site of the former Alger iron furnace. Eventually, Stanley experienced capital shortages and sold Stanley Electric Manufacturing to the Roebeling Brothers. Through further amalgamations, the company was renamed the General Electric Pittsfield Works in 1906. Stanley returned to Great Barrington and opened a new factory to make watt-hour meters. Over many years of entrepreneurial tinkering, William Stanley secured 129 patents. One of his last was the “It will not break” Stanley all-metal vacuum bottle which is still made today.



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In 1893, the Pittsfield Illuminating Company was founded and electric lights were installed in Sarah Morgan's private Lenox home called Ventfort Hall.

In the late nineteenth century, the Berkshires rivaled Newport, Rhode Island, and Bar Harbor, Maine, as a place for the wealthy to spend the summer in the company of "society." At the height of the Gilded Age, over 75 "cottages"—massive summer mansions—dotted the Upper Housatonic Valley countryside. In a nation that esteemed worldly accomplishments, the cottages evidenced material success. All but one cottage lives on as a grand scale house museum, hotel, religious center, or an educational institution. "Cottages" were built by writers, painters, musicians, lawyers, doctors, inventors, bankers, the scions of old families and by the most determined nouveaux riches. The leading architects of the day, including Frederick Law Olmstead, Calvert Vaux and McKim, Meade & White, built the houses and designed the grounds. Each house expressed the owner's preferences, in such divergent styles as late-Victorian opulence, New England shingle style, Neo-Classical revivals, French Chateaux, or Italianate. Virtually everything required for their construction could be found nearby: wood for framing from the forests; quarried marble and granite from deposits in Lee; limestone from North Adams; and a talented pool of artisans and craftspeople to build and furnish them. A few examples of cottages:

- The wealthy, well-born, well-married, and successful Edith Newbold Jones Wharton lived up to her family-inspired saying "keeping up with the Joneses." She was the first woman to win a Pulitzer Prize for fiction (for the *Age of Innocence* in 1921) and to receive an honorary degree from Yale University. Her first published book was *The Decoration of Houses*, a nonfiction treatise on design that praised "the noble European tradition of strong architecture accentuated by furniture that suits the room." Wharton believed that rooms should reflect simple, classical design principles—symmetry, proportion and a sense of balance—all of which characterize The Mount, her 1902 house in Lenox. Both the building and the gardens, now open to the public, reflect her

principles. Just as the interior is a masterpiece of planning and taste, her landscape design created outdoor garden "rooms."

- The 1896 country home and sculpting studio of Daniel Chester French is in Stockbridge. French is best known for Seated Lincoln, his 1922 monumental piece at the Lincoln Memorial in Washington, the Minuteman at North Bridge in Concord, John Harvard in Harvard Yard, and Alma Mater at Columbia University. French filled Chesterwood with American and European decorative arts and paintings, as well as his own work, and designed the woodland walks with mountain vistas and perennial gardens. The Studio includes a standard-gauge railroad track on which he could roll large sculpture outdoors so they could be viewed in natural light. Operated by the National Trust for Historic Preservation, it is open to the public.
- The 28 room Vent Fort (and later, Ventfort Hall) in Lenox was built for Sarah Morgan, sister of J.P. Morgan in 1893. This Elizabethan-revival mansion designed by the architects Rotch & Tilden, has 15 bedrooms, 13 bathrooms, and 17 fireplaces. The house and grounds, which are open to the public, are listed on the National Register of Historic Places. Ventfort Hall is now the Museum of the Gilded Age.
- McKim, Meade & White designed Naumkeag as a Stockbridge getaway for New York attorney Joseph Choate, later Ambassador to England under President William McKinley. The estate's eight acres of terraced gardens and landscaped grounds sit within forty acres of woodlands and meadow that stretch to the Housatonic River. The design, like that of The Mount, includes numerous garden rooms: the Afternoon Garden; Tree Peony Terrace; Rose Garden; Evergreen Garden; Chinese Garden; Arborvitae Walk; and Linden Walk. Most famous is the Blue Steps, a series of deep blue fountain pools flanked by four flights of stairs climbing up a gentle hillside and overhung by birch trees. The Trustees of the Reservations open Naumkeag to the public. It is a National Historic Landmark.

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- Great Barrington's Kellogg Terrace, often called Searle's Castle, was inspired by a French chateau. It was built of local Blue Dolomite stone in 1880 by Mary Hopkins, widow of the railroad tycoon Mark Hopkins. It features 50 rooms, 36 fireplaces, and over 60,000 square feet of interior space.
- The Battell-Stoeckel mansion known as "Whitehouse" in Norfolk, Connecticut, was constructed in about 1810 on 70 acres in northwest Connecticut. From the outset, the 35-room mansion was always filled with music. In 1906, the owners built a 900-seat music shed that is now home to the Yale Summer Music School and the Norfolk Chamber Music Festival. Whitehouse is open to the public during performances and is listed on the National Register of Historic Places.
- Elm Court was built in 1886 by William Douglas Sloane and Emily Vanderbilt. It is one of the largest Shingle style homes in the nation. It was designed by Peabody & Starnes, and Frederick Law Olmstead created the grounds. After a few "rebirths" as a hotel, it remains in the private hands of descendants of the original builders who rent it for weddings and conferences. It is on the National Register and the grounds are open to the public for hiking and picnics.
- In 1906 wealthy turpentine magnate Spencer Shotter, purchased Shadowbrook, a mansion and 350-acre parcel. He leased it as a summer resort hotel and rented it to Gwynne Vanderbilt. Shadowbrook became the summer residence of steel magnate Andrew Carnegie in 1917. Carnegie's widow sold it to the New England Province of the Society of Jesus for use as a Jesuit retreat. Tragedy struck in 1956 when Shadowbrook was destroyed by fire and four Jesuit fathers perished. Although the Jesuits rebuilt a mammoth complex on the site, the entire estate was sold in 1970 and Shadowbrook closed. It now houses the Kripalu Center for Yoga and Health.

As owners died, the next generation had different priorities, and as fortunes changed, the cottages

came up for sale or were donated for private schools or for other institutional use.

As the 19th century gave way to the 20th, there was an economic and social shift in the Upper Housatonic Valley from an economic industrial base of iron, paper, electricity, and wool to an economy based on artistic creativity, nature, and culture. From the Gilded Age opulence accessible only to a few grew offerings and experiences enjoyed by many. Much of this transition was influenced by reverence and respect for the valley's spectacular natural setting.

By the late 1800s the model set by Stockbridge's Laurel Hill Association was replicated across the country. Founded in 1853, Laurel Hill was the first community association established with the specific goal of community beautification through civic works such as landscaping and cleanliness. The organization had successfully worked to beautify the town by building sidewalks, planting trees and advocating for aesthetic improvements throughout Stockbridge. By 1880, the concept had been adopted by 28 other Massachusetts towns and at least 55 in Connecticut. As the popularity and effectiveness of these civic associations spread, national conferences were organized to share experience and ideas. The popularity of new, better civic identities quickly coalesced into the "City Beautiful" movement, bringing about new approaches to artful city planning as well as addressing larger policy changes and spurring governmental efforts to implement these grand ideas.

At 3,491 feet, Mt. Greylock is the Commonwealth's highest peak. It has drawn nature lovers, scientists, and recreation enthusiasts to its slopes for centuries and inspired some of the greatest American writers and artists, including Henry David Thoreau, Herman Melville, Nathaniel Hawthorne, Edith Wharton, William Cullen Bryant, and Thomas Cole.

By the mid-1880s, the forested tops of both Mt. Greylock in Massachusetts and Bear Mountain in Connecticut were being cleared of trees for charcoal to fuel iron furnaces at Mt. Riga and Copake Falls. As new roads were cut and slopes left barren, the mountains' character was altered. Wildfires and

## APPENDIX 5 *continued*

landslides hastened degradation. Determined to save Mt. Greylock, a Berkshire group incorporated the Greylock Park Association (GPA) in 1885 and purchased 400 acres at the summit and ridge line. GPA became one of the first private land conservation organizations in the nation. Focused on protecting the summit from further encroachment, GPA built a new road and observation tower (using Salisbury iron). Road tolls and admission fees financed GPA's efforts, but the costs of maintaining the facility exceeded income. In 1898 a petition was brought before the Massachusetts Legislature to purchase Greylock as a State Reservation. Mount Greylock State Reservation became the first forest preserve in the Massachusetts State Parks and Recreation system. Today, Mt. Greylock State Reservation contains more than 12,500 acres of mountain, forest, valleys and streams. It includes a unique collection of CCC-era buildings and the Veterans War Memorial Tower and a segment of the Appalachian Trail crosses the summit.

In many ways, the story of Mt. Greylock, just north of the Heritage Area, is the story of the Upper Housatonic Valley. The pattern is one of progression: from Indian hunting grounds, subsistence farming by white settlers; abandonment of farms; exploitation of resources; recovery of natural resources; purchase for private retreats and preserves; and finally government-financed or private organization-financed conservation. In another sense, the chain includes wilderness and sustainability, inspiration, conservation and preservation. This pattern appears again and again, despite the Great Depression and World Wars I and II. Other examples are Mt. Everett, Beartown State Forest, October Mountain State Forest, Monument Mountain, Richmond Peak, and Ashintully estate. Residents of the Upper Housatonic Valley seek to balance cultural, economic, industrial, and natural assets so that there is harmony between nature and human activity.

As the construction of cottages waned, a new wave of civic and commercial architecture emerged. Two theatres provided entertainment for visitors and residents:

- Pittsfield's Colonial Theater opened in 1903. Designed by noted theater architect J. B.

McElfatrick, the theatre's stage and audience chamber were a class above most playhouses of the day. Over the proscenium arch, in a "sail vault," is a soundboard concealed by a mural representing Art and Music. The soundboard, rounded room elements and articulated plaster detail are McElfatrick's design signatures and contributors to the superior natural acoustics of the theater. While McElfatrick designed hundreds of theaters throughout North America during the last half of the 19th and first few years of the 20th centuries (66 in New York City alone), the Colonial is one of only a handful still standing. The Colonial hosted many early theater greats such as George M. Cohan, Sara Bernhardt, John Barrymore, Eubie Blake, Douglas Fairbanks Sr., Billie Burke, John Phillips Sousa, and the Ziegfeld Follies. It provided a venue for former President William Howard Taft on January 16, 1917, as he spoke to the League to Enforce Peace in opposition to America's joining World War I.

- The Colonial was converted to a full-time movie theater in 1937, with an occasional stage production. It closed in 1949. Following Hillary Clinton's naming of the Colonial Theater a "National Historic Treasure" in 1998, the community invested more than \$22 million to refurbish the century-old space. The Colonial Theatre reopened to the public in 2006 and is a major presence in downtown Pittsfield.
- Joseph McArthur Vance designed Great Barrington's Mahaiwe Theatre which opened its doors in 1905. Unlike the Colonial, the Mahaiwe operated continuously as a theater for the next 100 years, although it was converted to a movie house in 1930. With a nine-million-dollar restoration for its centennial birthday, it reopened as the Mahaiwe Performing Arts Center in May 2005. It was listed on the National Register of Historic Places in 2008.
- Another performance space—now in the National Register of Historic Places--originally opened in 1918. One of the noted American patronesses of music, Elizabeth Sprague



Coolidge, launched what became the South Mountain Concerts—a chamber music series in Pittsfield presented in a Colonial-style structure made of timber from an old textile mill. The 450-seat hall is just outside Pittsfield.

- The curtain went up at the Berkshire Playhouse, a repurposed and relocated 1887 Stockbridge casino designed by Stanford White, on June 4, 1928, with a production of “The Cradle Song” starring Eva Le Gallienne. Other Playhouse actors included James Cagney, Lionel Barrymore, Katharine Hepburn and Buster Keaton. Thornton Wilder played the part of stage manager in a production of his own “Our Town.” In 1967 the Berkshire Playhouse was reincorporated as the Berkshire Theatre Festival. The Playhouse was listed in the National Register of Historic Places in 1976.

In 1966, the National Trust for Historic Preservation helped frame the National Historic Preservation Act, the most far-reaching preservation legislation ever enacted in the United States. On October 15, 1966, Chesterwood in Stockbridge and the Herman Melville home, Arrowhead, in Pittsfield, became the first structures in the Upper Housatonic Valley to be designated in the National Register of Historic Places. To promote conservation and preservation as well as to support their own work, the Laurel Hill Association started an annual scholarship award in 1977 for local students pursuing a degree in environmental studies, historic or cultural preservation, architecture, or a related field.

Throughout the 1960s and 1970s, the Valley’s historic preservation efforts were not without controversy. Much like threats to natural landscapes, threats to architecture became cause for civic debate. In 1967, one year after the passage of the National Historic Landmarks Act, the Stockbridge community rallied to save an historic home on Main Street, the Old Corner House. Two of the activist groups’ most ardent members—Molly and Norman Rockwell—became the new owners. The Rockwells opened the Norman Rockwell Museum in the house in 1969 and maintained the Old Corner House as their home for

the next 25 years. Outside of Pittsfield, the Shaker Central Ministry closed their Hancock community in 1960 and sold the buildings and surrounding acreage to a group of Shaker enthusiasts, collectors, and scholars who formed a not-for-profit corporation modeled after a similar organization that had created the Shaker Museum in Old Chatham, New York. The Hancock community became Hancock Shaker Village.

Perhaps inspired by the nineteenth century cottages, many twentieth century Upper Housatonic Valley residents pursued renovation and construction projects with their eventual public use in mind. Conversion from home to house museum is a familiar story in the Upper Housatonic Valley. For example:

- Artist George L.K. Morris hired Yale classmate George Sanderson to design and build him a studio at Brookhurst in Lenox. Morris was a heavily influenced by the work of Le Corbusier, and his studio would be one of the first modernist structures in New England. In 1941 after marrying artist/singer Suzy Frelinghuysen, Morris hired local architect John Butler Swann to design a house integral with the existing studio. Upon her death in 1988 (Morris had died in 1975), Suzy Frelinghuysen left instructions for the house, studio, and all artworks and furniture to be used for educational purposes. The Frelinghuysen Morris House and Studio opened to the public in 1998.
- In 1960 Jack Hargis and David Brush purchased the 1750 Bidwell house in Monterey and began a 26-year restoration project. Their intent was to restore the house and leave it as a museum. The museum was formed in 1990.
- English sculptor Sir Henry Hudson Kitson began transforming his barn in Tyringham into a studio in the 1920s. Santarella and its grounds became Kitson’s primary focus for the last 25 years of his life, consuming his time and money until his death in 1947. The most striking feature of Kitson’s studio was its 80-ton asphalt contoured shingle roof that makes the structure look like a “Gingerbread House” found in storybooks. Originally, Kitson envisioned a rolling, thatched roof similar to the traditional roofs in his native

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Britain. He enlisted the help of local farmers to grow a crop of rye for the thatching, but when the crop failed he turned to asphalt shingles to create the desired effect. Each tile was hand-cut into a wave-like shape and then placed in thick layers of colored shingles. The project took three workers twelve years to complete. After Kitson died, Santarella was bought by the Davis family, who owned and operated the Tyringham Galleries on the property until 1996. From 1996 to 2003, the Talbert-Atkins family ran the Henry Kitson Museum and Sculpture Gardens and hosted an artist-in-residence program. The current owners, the Hoefer-Brandmeyer family, hope to preserve Santarella so that it can continue to enchant visitors.

In the twentieth century, industry in the Upper Housatonic valley underwent great transformations. By the end of World War I, the iron industry was waning and electrical generation and transmission had undergone several major revolutions. The papermaking industry continued as a major employer by using new technologies. Textiles maintained importance until the 1950s. By the end of the twentieth century, public attitudes on the environment would affect valley industries, both positively and negatively.

By World War II, General Electric had become Pittsfield's major employer with more than 13,000 workers in three divisions: transformers; ordnance; and plastics. GE's influence continued until the 1960s, when speculation arose that the company was responsible for contaminating the Housatonic River. At the same time, markets for large transformers decline, in part due to oil shortages and American industry's growing interest in reduced power consumption. As a result, GE's transformer operation closed in 1986, and GE remains liable for PCB contamination in ground water and the Housatonic River. The clean up remains an ongoing issue. GE sold its power transformer business to Westinghouse in 1986.

In 1914, Connecticut Light & Power Company (CL&P) installed a hydroelectric plant in a water powered, company-owned canal, which is still in use today. This plant used new technologies in transformer design

and waterpower to form a statewide power transmission network. The visionary behind that network was Henry Roraback, a North Canaan lawyer and politician who founded CL&P and served as its president from 1925 until his death in 1937. Roraback not only created Connecticut's power grid, but also served as the voice of the state's Republican Party. Though he never held public office, he advocated for lower taxes, state service cuts from greater efficiencies in government, and a "pay-as-you-go" philosophy of government services.

As early as 1905, Roraback had plans for a statewide electrical system in Connecticut. Roraback organized the Rocky River Power Company and in 1911, drew a power grid map for the western part of the state. Years later, as lines were installed their routes closely followed his original plans. In short order, Rocky River changed its name to CL&P. The Housatonic Power Company, the United Electric Light & Water Company, and the Seymour Electric Company were acquired by CL&P which merged with Eastern Connecticut Power Company in 1929. The Connecticut Light and Power system was established.

Another era in Connecticut's industry ended after World War I. Stiff competition from other iron and steel centers with better access to large amounts of raw material and better transportation forced the Beckley Furnace in Canaan to close in 1919 while East Canaan #3 remained in business until 1923. While East Canaan #4 was under construction in 1920, it was never put in blast. No trace remains today.

In 1922 the Kaufman brothers open a wholesale candy supply business in Pittsfield. They acquired a toy supplier from a previous client as payment for outstanding debt for candy in 1940. The onset of World War II caused shortages in supplies for making candy, especially sugar. Focusing on their new enterprise, the brothers changed the wholesale company's name to Kay-Bee Toy & Hobby Stores. The Kauffman brothers opened their first retail toy store in Connecticut in 1959 and by 1973 Kay- Bee Toys had 1,200 outlets in the United States and Canada. Kay-Bee was purchased by the Melville Corporation in 1981.

## APPENDIX 5 *continued*

The broadcloth production era ended as well. Berkshire Woolen closed its doors in Great Barrington in 1960. By the end of the 1960s, Wyandotte Worsted in Pittsfield and Strong and Hewat in Clarksburg were also closed.

The growing national movement to acknowledge the importance of architecture, art, and landscape as landmarks soon focused on America's industrial heritage. The Upper Housatonic Valley recognized its industrial landmarks as early as the 1930s and 1940s, a full three decades before other parts of the country.

- In Dalton the Old Stone Mill was converted into the Crane Museum of Paper Making in 1930.
- In 1946 civil engineer Charles Rufus Harte recognized the importance of the Beckley Furnace and developed a plan for purchase and preservation. In 1978, Beckley was placed in the National Register of Historic Places and named as Connecticut's Industrial Monument.

In recognition of industry in general, the Connecticut Antique Machinery Association opened in 1984 to celebrate the "machine." In 1985, the natural and the industrial came together with the creation of Natural Bridge State Park in North Adams. Natural Bridge is the site of an abandoned marble quarry that contains the only marble bridge in North America.

Several recently established Upper Housatonic Valley companies embody a commitment to corporate social responsibility.

- Industry and agriculture met in northwestern Connecticut in 1997 when Matt and Ben Freund installed a methane digester on their father's farm. In the digester, raw cow manure is heated and stored in a large tank. The methane gas is collected and burned, sometimes for heating and power. Solids and liquids are separated, and liquids are returned to the fields to nourish next year's crop of cow feed. The composted solids (by now, free of weeds and seeds) is molded into biodegradable seedling containers called CowPots™.

These pots withstand months in a greenhouse, but within four weeks of planting, they dissolve and fertilize. A new industry was born.

- The electric power industry re-emerged almost a century after Roraback's hydroelectric plant began providing power to Connecticut—this time using wind, not water. The "Zephyr" is a 1.5MW wind turbine that provides about 33 percent of the power demands at Jiminy Peak Resort in Hancock. The aesthetic controversy surrounding the appearance of turbines on mountain ridge lines remains.

Environmentalism and heritage preservation has been an ongoing concern in the Upper Housatonic Valley since the late 1800s. It is the product of excessive logging, pollution, small-town historical societies, restoration projects, and concern for the natural environment in the face of global warming.

The Upper Housatonic Valley remains a "place apart." While it is not New York or Boston or Hartford (nor does it want to be), the Valley's institutions exhibit the same level of quality:

- In 1903, when Pittsfield paper magnate Zenas Crane founded the Berkshire Museum he took his inspiration from the American Museum for Natural Science, the Smithsonian Institution, and the Metropolitan Museum of Art. The third-generation owner of Crane & Co. Crane, he wanted to blend the best of each in a new museum for the people of western Massachusetts. He sought out art and artifacts for the Berkshire and encouraged collections that would bring home a cross-section of the world's wonders to make The Berkshire a "window on the world." The Berkshire's broad and varied collections include pieces from nearly every continent, a mixture of the whimsical and the exemplary, fine art and sculpture, natural science specimens, and ancient artifacts.
- Connecticut born and Harvard-trained forester Benton MacKaye presented his idea for an "Appalachian Trail" to the public in an October 1921 article "An Appalachian Trail: A Project in

Regional Planning” in the *Journal of the American Institute of Architects*. It called for a network of work camps and communities in the mountains, all linked by a trail that ran from the highest point in New England to the highest point in the South. He envisioned the Trail as a path interspersed with planned wilderness communities where people could renew themselves.

- MacKaye’s vision took hold by providing a connective recreational idea not previously articulated. The notion came at a time when there had been moments of park and open space preservation, but usually in isolated contexts or because of imminent threats. By presenting the idea as a larger system of regional planning, MacKaye inspired individual groups to work together for a national project. On October 7, 1923, the first section of the trail—from Bear Mountain at the tri-corners border west through Harriman State Park to Arden, New York—opened to the public. The Appalachian Trail was completed as a continuous footpath extending from Maine to Georgia in August 1937 and would be named an official National Scenic Trail in 1968. From the day that MacKaye’s vision was first articulated to the public, it took 15 years and 10 months to complete all 2,178 miles of pathway through thirteen states.
- The Appalachian National Scenic Trail continues as a cooperative management network that includes ATC, the National Park Service, USDA’s Forest Service, 30 maintaining clubs and dozens of state and local partners.

Faced with staggering unemployment and a downward spiraling economy at the start of the Great Depression, Franklin Roosevelt launched the New Deal to put Americans to work. The Civilian Conservation Corps (CCC) played a major role in developing and improving parks and forests, especially in Massachusetts and Connecticut. The CCC was influential in all aspects of the Appalachian Trail (AT), in every state that is traversed. In Connecticut, between 1933 and 1942, more than 30,000 men stationed at twenty camps planted millions of trees, constructed roads and trails, controlled disease and insects, and built dams to create swimming areas.

In Sharon, CT, the CCC focused on road building, maintenance and forestry, and constructed fire ponds throughout the area.

The establishment of the AT inspired local residents, land trusts, wildlife protection groups, and both state governments to acquire significant land holdings. Together, these tracts form a network of state forests, state parks, reservations, and other protected areas. Many gifts, including numerous former estates, were absorbed into the public park system or managed by the Audubon Society and other stewardship organizations. Some organizations, like the Berkshire Botanical Garden (founded in Stockbridge in 1934), established distinct identities and missions. The Garden’s collection includes 3,000 species and varieties that thrive in the Upper Housatonic Valley.

With the Great Depression under way, Great Barrington native W.E.B. Du Bois delivered a speech at the annual meeting of the alumni of Searles High School on July 21, 1930, challenging the community to address the pollution in the Housatonic River. Du Bois was the first prominent person to address the Housatonic’s critical state and to turn the environmental gaze from the mountains to the river.

His words would not take root for another decade. The Housatonic Valley Association (HVA) was founded in 1941 “to conserve the natural character and environmental health of communities by protecting and restoring the lands and waters of the Housatonic Watershed for this and future generations.” This mission statement not only marked a change from the mountains to the river and its watershed, but also ushered in a new typology of environmental thinking—from the curatorial vision of landscape to reparative reconstruction.

HVA was not the only group that saw the importance of the river and water quality. In 1956 the Nature Conservancy purchased Beckley Bog in Norfolk as the southernmost sphagnum-heath-black spruce bog in New England. Scientists were beginning to link water quality in the natural environment and the health of the landscape and people who lived near it. On August 30, 1946 the Stockbridge Bowl Association



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was formed with “to protect the natural beauty of the Stockbridge Bowl... and to set the standards that may aid the general cause of conservation.” During the 1940s and 1950s water quality was finally receiving attention. In 1961 Du Bois again wrote to the Searles Alumni Association president, George Fitzpatrick, challenging the community to deal with the condition of the Housatonic River, thirty years after first raising the issue.

During the 1960s, as the nation was gaining a better understanding of the impacts that industry had on the environment, HVA and other organizations provided leadership for elected officials who could achieve reform through the law. In 1967 the Berkshire Natural Resources Council was created as a land conservation trust. The Council emphasizes protecting Berkshire’s farms, forests, streams and ridgelines which give clean water, fresh air, local produce, healthy wildlife and outstanding recreational opportunities.

As community groups focused on these regional issues, federal environmental protection legislation—especially the several water quality acts signed by Presidents Nixon, Carter and Reagan—provided powerful governmental measures to cleanse the Housatonic River. These laws changed the relationships between the Upper Housatonic Valley’s major employers and the valley’s residents.

With the force of federal law behind them, HVA, BNRC, and others acted to protect and cleanse the river. As a result of speculation that the PCB-laden Housatonic River was being poisoned by GE, the company was required to: 1) document the facility’s hazardous waste disposal practices; 2) examine the extent of existing contamination on site; and 3) investigate contamination of the Housatonic River and propose corrective action alternatives. A 1983 report concluded that approximately 39,000 pounds of PCBs had adhered to the river bottom and backwater sediments contained another 250,000 cubic yards of contamination spread over 20 miles in the Housatonic.

In 1992 HVA launched the Hoosic River Greenway. That same year, a coalition of environmentalists, sports enthusiasts, and political leaders established

the Housatonic River Initiative as a “last chance” to pressure GE into addressing the problem. Also in 1992, community activists and the Great Barrington Land Conservancy opened the Housatonic River Walk in downtown Great Barrington.

In 1996 extremely high levels of PCB-contaminated oil were found in riverbank soils and river sediment opposite the former GE Building 68 in Pittsfield which led to the site’s 1997 placement on the National Priorities List as a “Superfund” site. Two years later, GE agreed to a \$250 million settlement to clean PCBs in the Housatonic River. Additional awards are still pending. Seventy years had elapsed since Du Bois’ original call to action.

The Upper Housatonic Valley has always been fertile ground for independent thinking, creative originality in problem solving, and inventiveness in the arts and in almost every other endeavor. The land trust movement, environmental-friendly attitudes, stewardship of the natural and built environments, and higher education are all exceedingly important to the region and its people. For example:

- In 1906, Episcopal monk and Columbia University graduate Reverend Frederick Herbert Sill founded Kent School in Kent, CT. Sill’s mission was the educational value of service, the importance of respecting others, respecting one’s self, the connection between intellectual effort and spiritual reward, and giving back to communities. In 1960 Kent became one of the first boarding schools in New England to accept women.
- In 1907 Seaver Burton Buck founded the Berkshire School in Sheffield beneath the “dome” of Mt. Everett, the second highest mountain in Massachusetts. Buck, a Harvard graduate, wove appreciation for and exploration of the mountain into classical classroom teaching.
- With guidance from then Yale University President Timothy Dwight, Maria Hotchkiss established the Hotchkiss School in 1891 to prepare young men for Yale. Now coeducational, Hotchkiss has grown to sixteen academic

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departments and enjoys acclaim as one of the country's premier secondary schools.

- Simon's Rock College of Bard was founded in 1966 by Elizabeth Blodgett Hall in Great Barrington as a small, selective, and intensive college of liberal arts and sciences and "early school." Simon's Rock is the nation's only college of the liberal arts and sciences designed expressly to allow admissions before students finish high school. Most students enter Simon's Rock after completing the 10th or 11th grade and follow programs leading to the Associate in Arts and Bachelor of Arts degrees in liberal arts.
- Rudolf Steiner (1861-1925) was an Austrian philosopher, scientist, artist and educator whose first major work *The Philosophy of Freedom* established a worldview known as anthroposophy which echoed Transcendentalism. The anthroposophical approach to education took hold in the early 20th century as adherents launched centers for those with special needs, organic farms, medical clinics, and banks. The goal was to develop cooperative business models that balanced economic associations in a harmonious and socially responsible manner. These ideas resonated in the Upper Housatonic Valley, leading to the establishment of the Rudolf Steiner School in 1971 and the Great Barrington Waldorf High School in 2004.
- In 1907, while recuperating from tuberculosis at home in Stockbridge, Austen Fox Riggs turned his interest in psychiatry and psychology into a new treatment system that combined talk therapy with a structured routine, balancing work, play, rest, and exercise. He founded the Stockbridge Institute for the Psychoneuroses (renamed The Austen Riggs Foundation in 1919).
- About 1913, in Monterey, MA, Agnes and Will Gould borrowed \$1,000 and made a down payment on a farm. Eight guests and family members arrived with the Goulds and discovered that an endless amount of work was needed to make the property livable. Others arrived offering labor in exchange for getting away from their personal lives. The Goulds turned farm work into a therapy as they pioneered rehabilitation that combined clinical practice with physical labor in the belief that kindness and respect for others created valued work in community life.
- At William F. Buckley Jr.'s Sharon estate, a group of 90 young people created the Young Americans for Freedom. The YAF produced a founding document known as the "Sharon Statement." A magazine and political movement was born which influenced national economic theory and politics into the 21st century.
- As a counter notion to YAF, Alice and Ray Brock bought a deconsecrated church in Great Barrington for \$2,000 in 1964. Though they had many visitors, two 1965 guests would make history. Arlo Guthrie (age 18) and Richard Robbins (age 19) were arrested by Stockbridge officer William "Obie" Obanhein for illegally dumping some of Alice's Thanksgiving Day garbage. Guthrie turned the experience into an 18-minute 34-second hit song on his 1967 debut album. The song and 1969 film became prominent in the counterculture movement of the late 1960s.
- Another application of Steiner's theories became models for Community Land Trusts (CLTs) and Community Sustainable Agriculture (CSA). Great Barrington resident Robert Swann brought these ideas from Europe in the 1970s and helped found the E.F. Schumacher Society in 1980. Schumacher promoted building strong local economies by linking people, land, and community. Model programs include local currencies, community land trusts, micro-lending, educational events and an open library to engage scholars and inspire citizen-activists who might inspire new models of environmentalism.
- When the Community Land Trust (CLT) of the Southern Berkshires was established in 1980, the guiding principle was that homes, barns, fences, gardens and all things done with or on the land were owned by individuals, but the land itself was owned by the community as a whole.
- In 1986, South Egremont farmer Robin Van En

put communal land use into practice by opening the Indian Line Organic Farm, one of the first CSAs in the nation.

- In 1986, E. F. Schumacher began construction of a planned community that incorporated the CLT model. By 1987, the Cornwall (CT) Conservation Trust was formed to preserve Cornwall's rural and historic character. Their mission was to acquire properties and conservation easements and to manage holdings in ways that promoted farming, forest improvement, water quality, wildlife habitats, recreation, and open space. In 1989, Francis Lane created the Sheffield Land Trust which now protects over 1,800 acres. The Warren (CT) Land Trust was formed the same year. The Egremont Land Trust started in 1985 to counter development pressures associated with a proposed project.
- The year 2001 marked the beginning of the Storefront Artist Project in Pittsfield. Its mission was to fill empty storefronts and forge a community of artists, entrepreneurs, businesses, and residents. When the project ended in 2011, it had been a successful catalyst for positive changes in Pittsfield, including the opening of a theatre, galleries, restaurants, pop-up stores, coffee shops, and artist run projects. The Storefront Artist Project and Pittsfield have become models of regeneration for other cities.
- In 2006 The Schumacher Society moved beyond land and into the local economy by launching "BerkShares"—a community-based currency program that allows residents, merchants, and farmers to create an alternative economy. "BerkShares" are designed by local artists in \$1, \$5, \$10, \$20 and \$50 denominations, and their designs incorporate local images and figures like the Stockbridge Mohicans, W.E.B. Du Bois, Robin Van En, Norman Rockwell, and Herman Melville.

The Upper Housatonic Valley offers all manner of outdoor recreation: hiking; hunting; biking; running; kayaking and rafting; birding; fishing; shutter-bugging... and the list goes on. All of these are born from

a love of the landscapes and the seasons. Increasingly, stewardship is a part of outdoor recreation.

In the late 1800s, as music and art blossomed in the Valley, George Burbank, a Pittsfield contractor, captured America's latest sports craze: baseball. He built Pittsfield's Wahconah Park, an enclosed ballpark and grandstand on eight acres of land behind Brennen's Saloon. In 1909 Wahconah Park replaced the open bleachers with a proper stadium. Wahconah hosted professional baseball until 2003. In 1924, Lou Gehrig made his professional debut at Wahconah by hitting a home run into the Housatonic River.

The Upper Housatonic Valley ski industry with its slopes, trails, and cross-country tracks owes its early existence in part to the CCC which built Thunderbolt on Mt. Greylock. Thunderbolt remained popular from 1933 until the 1960s. In 1935 the first "ski trains" left Grand Central Station for the slopes of the Berkshires and the tracks in the Litchfield Hills. Bosquet ski area, near Pittsfield, pioneered with the "ski trains" and night skiing. By the late 1940s, several of the CCC sites were abandoned and other ski areas were bought by investors who saw recreation and skiing as a lucrative business. Jiminy Peak opened in 1948 and became the largest ski facility in the Berkshires. In 1999, Jiminy Peak merged with Brodie Mountain in New Ashford to become one of the largest ski resorts in the northeast.

Performing Arts abound in the Upper Housatonic Valley. Tanglewood and Jacob's Pillow are among the best known venues.

## Music

The name "Tanglewood" comes directly from Nathaniel Hawthorne. On advice from his publisher, in March 1850 Hawthorne rented a small cottage near Lake Mahkeenac in Stockbridge from William Aspinwall Tappan. It was there in 1853 that Hawthorne wrote *Tanglewood Tales*, a re-creation of Greek myth for boys and girls. To memorialize the popular book, Tappan renamed the cottage "Tanglewood" which became synonymous with the Tappan's summer estate.

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Tanglewood concerts began in 1934 when a group of music-loving summer residents arranged for 65 members of the New York Philharmonic to perform three concerts at a horse arena at Interlaken; this successful musical adventure was repeated the following year. In 1936 the Boston Symphony Orchestra (BSO) was invited to play the third three-concert series, and the BSO has been in residence ever since. That same year, Mary Aspinwall Tappan (descendant of Chinese merchant William Sturgis and abolitionist Lewis Tappan), donated the family's 210-acre summer estate—Tanglewood—to the orchestra. After a thunderstorm interfered with an all-Beethoven program, the fan-shaped, weather protected "Shed" was constructed to protect patrons (it can hold 5,100). In 1940 conductor Serge Koussevitzky initiated a summer school for approximately 300 young musicians, now known as the Tanglewood Music Center. In 1986 BSO bought the adjacent Highwood estate to increase Tanglewood's size by almost 40 percent. Seiji Ozawa Hall was built on the expanded property in 1994. Tanglewood draws over 350,000 visitors annually.

Many other music festivals and arts schools gravitated to the region or were spun off making the Upper Housatonic Valley one of America's premier cultural centers.

- The Norfolk Chamber Music Festival was established via the estate of Ellen Battell Stoeckel. In 1939 she bequeathed Whitehouse to Yale University for the study of music, as well as art and literature. The Norfolk Music School opened in 1941 and the Norfolk Art School began five years later. This Connecticut town is now home to the Yale Summer School of Music as well as the Festival.
- Music Mountain in Falls Village, CT, was founded by Jacques Gordon in 1930. Gordon was founder and first violinist for the Gordon String Quartet and was passionate about education through the performance of chamber music. Music Mountain brings together professionals and amateurs in a series of live performances. Gordon Hall and the Music Mountain residences are set on 120 acres.
- Winnie Davis Long Crane founded the Berkshire

Music School in December 1940 (it was originally called the Pittsfield Community Music School). Crane was also solo pianist with the Pittsfield Symphony Orchestra and one of Tanglewood's incorporators. Crane's vision provided quality education in music regardless of ability to pay, race, sex, religion, ethnic origin, age, or disability.

- In 1963 Robert Blafeld established the Berkshire Lyric Theatre as a professional community chorus in Pittsfield. Four years later, another Boston connection was made by creating the Boston University Tanglewood Institute, a summer program for high school student musicians at Tanglewood.
- The Berkshire Choral Festival was founded Sheffield in 1982, providing a place for amateur choral singers to rehearse and perform masterpieces of the choral repertoire under the direction of world-class conductors and professional musical staff.
- Great Barrington's Aston Magna Festival Orchestra began celebrating 17th and 18th century music in 1972. The Stockbridge Chamber Concerts started in 1975. And in 1986 the Mixed Company Theater of Great Barrington organized a monthly concert series for performing songwriters. Meanwhile, the Berkshire Bach Society, founded in 1990 by Simon Wainrib in Great Barrington, provides a thorough exploration of Bach's work and legacy through study and performance.

### Dance

In 1790, the Carter family established a mountaintop farm at the crest of a stagecoach road between Boston and Albany. The twisting road leading up the hill to the farm resembled rungs on a ladder and inspired residents to name the road "Jacob's Ladder." Since a large boulder behind Carter's farmhouse resembled a pillow, the property became known as "Jacob's Pillow," combining the story of Jacob from the Book of Genesis (in which Jacob lays his head upon a rock and dreams of a ladder to heaven) and the farm's road access via "Jacob's Ladder." Modern dance pioneer Ted Shawn



## APPENDIX 5 *continued*

bought the farm as a retreat in 1931. Shawn and his wife Ruth St. Denis led the highly regarded Denishawn Company which popularized a new American dance form, rooted in theatrical and multi-cultural traditions rather than European ballet. Their innovative work and cross-country exposure paved the way for a generation of dance pioneers: Martha Graham; Charles Weidman; Doris Humphrey; and Jack Cole. Shawn and St. Denis separated (personally and professionally) and Shawn conducted the last rehearsals of the Denishawn era at Jacob's Pillow in the early 1930s.

One of Shawn's goals was to legitimize dance as a career for American men. In 1933 he recruited eight men, including former Denishawn dancer Barton Mumaw and several physical education students from Springfield College, for a new company. Intent on challenging the image of men in dance, they forged a new, muscular style. In their time off from rehearsal and experimentation, they constructed the buildings still used at Jacob's Pillow. In July 1933 Shawn and his Men Dancers started giving public "Tea Lecture Demonstrations" to promote their work and to raise money. Their popularity expanded and, by the end of the summer, audiences were being turned away at the door. During a period Shawn termed "seven magic years," Shawn and his Men Dancers toured the United States, Canada, Cuba, and England, staging more than 1,250 performances in 750 cities; they also continued their summer "Tea Lecture Demonstrations" at the Pillow.

The Selective Service Act of 1939 caused the troupe to disband. An artistic statement made, it was time to end his successful crusade. By May 1940, the Men Dancers left the Pillow and joined the Armed Forces. Deeply in debt, Shawn leased Jacob's Pillow to Mary Washington Ball, a dance teacher who produced the Berkshire Hills Dance Festival in 1940. Shawn credited Ball for beginning diverse programs that became the Pillow's hallmark, but the summer of 1940 was a financial failure. Shawn leased the Pillow again in 1941 to British ballet stars Alicia Markova and Anton Dolin. Their International Dance Festival was very successful. Local supporters formed the Jacob's Pillow Dance Festival Committee, raised \$50,000, bought the

property, and built a proper theater (all performances had been staged in the barn studio). Shawn was named director. In spite of wartime hardships, like gasoline, tire, and food rationing, audiences climbed the hill on foot and horseback to attend programs of ballet, modern dance, mime, ballroom dance, and folk dance from many cultures.

On July 9, 1942 the Ted Shawn Theatre—the first theater in the United States designed specifically for dance—opened its doors. Shawn remained at the helm of the Pillow until his death in 1972 at age 80. In 2003 Jacob's Pillow was declared a National Historic Landmark as "an exceptional cultural venue that holds value for all Americans." It is the only dance entity in the nation to receive this honor.

The Pillow celebrated its 75th anniversary in 2007 and launched an endowment campaign. The Pillow's success and prestige drew other dance companies to the region. One of the first was the brainchild of Madeline Cantarella Culpo. In 1955 she established a dance school in Pittsfield to provide personal attention and training for students and professional dancers. Five years later, the Albany Berkshire Ballet opened its doors in Pittsfield. Originally known as the Berkshire Ballet Guild, it serves advanced students. In 1975 it became the Berkshire Ballet, a fulltime professional Company which expanded to a second location in Albany 1989.

### Theatre

While music and dance are the most well-known cultural pursuits in the Upper Housatonic Valley, other performing art forms have a strong presence too. Legitimate theater got its first boost when the Berkshire Playhouse opened in Stockbridge in 1928; it is now the oldest performing arts venue in the Berkshires. The Playhouse was renamed as the Berkshire Theater Festival in 1967 and added the intimate (122 seats) Unicorn Theatre in 1996. Tina Packer and Kristin Linklater created Shakespeare & Company in Lenox in 1978 to perform Shakespeare standards and new plays "of social and political significance" to more than 75,000 patrons each year. Shakespeare & Company trains professional actors and educates elementary

## APPENDIX 5 *continued*

through high school students. Another theatrical offering in the Upper Housatonic Valley is the Barrington Stage Company, established in 1995 by Julianne Boyd and Susan Sperber.

In the visual arts, the Kent (CT) Art Association is typical of perhaps two dozen regional alliances of well-established artists who spend part of each year in the Berkshires and Litchfield Hills. The Kent Art Association was established in 1930 by professional artists Rex Brasher, Elliot Clark, Floyd Clymer, Williard Dryden Paddock, Luis Mora, George Laurence Nelson, Spencer Nichols, Robert Nisbet, and Frederick Waugh. Six of these were members of the National Academy. The first annual shows included only the nine original members. Later, other artists were juried, accepted, and became associates.

Like Daniel Chester French and Henry Hudson Kitson before him, Norman Rockwell was drawn to the Upper Housatonic Valley and moved there in 1953. Through the 1960s Rockwell's work became focused on civil rights and environmental issues. By the late 1960s, the Rockwells spearheaded preservation of Stockbridge's Old Corner House and opened a museum of Rockwell's work in the Old Corner House. Rockwell died there in 1978. In 1993 the museum moved into the Robert A.M. Stern-designed museum that welcomes over 300,000 visitors annually.

Rockwell's work mirrored the culture and traditions of small town life in the Upper Housatonic Valley. In turn, the culture and traditions of the region influenced his world views and popular works.

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Rand, Christopher. *The Changing Landscape: Salisbury, Connecticut*. New York: Oxford University Press, 1968.

Stevens, Lauren. *Explorer's Guide The Berkshire Book: A Great Destination*. (8<sup>th</sup> edition) Woodstock, VT: Countryman Press, 2006.

## APPENDIX 6

### List of Organizations in the History Alliance

Arrowhead, Pittsfield, MA

Becket Historic Quarry & Forest,  
Becket, MA

Beckley Furnace Industrial Monument,  
East Canaan, CT

Berkshire Historical Society,  
Pittsfield, MA

Berkshire Museum,  
Pittsfield, MA

Berkshire Scenic Railway Museum,  
Lenox, MA

Bidwell House Museum,  
Monterey, MA

Chesterwood,  
Stockbridge, MA

Col. John Ashley House,  
Ashley Falls, MA

Colebrook Historical Society,  
Colebrook, CT

Connecticut Museum of Mining and Mineral Science,  
Kent, CT

Cornwall Historical Society,  
Cornwall, CT

Crane Museum of Papermaking,  
Dalton, MA

Dalton Historical Commission,  
Dalton, MA

Falls Village and Canaan Historical Society,  
Falls Village, CT

Friends of Du Bois Homesite,  
Great Barrington, MA

Great Barrington Historical Society  
Great Barrington, MA

Hancock Shaker Village,  
Hancock, MA

Kent Historical Society,  
Kent CT

Mission House Museum,  
Stockbridge, MA

Naumkeag Museum and Gardens,  
Stockbridge, MA

Norfolk Historical Society,  
Norfolk, CT

Norman Rockwell Museum,  
Stockbridge, MA

Salisbury Association,  
Salisbury, CT

Samuel Harrison Society,  
Pittsfield, MA

Santarella Museum & Gardens,  
Tyringham, MA

Sharon Historical Society,  
Sharon, CT

Sheffield Historical Society,  
Sheffield, MA

Sloane-Stanley Museum,  
Kent, CT

Stockbridge Library, Museum & Archives,  
Stockbridge, MA

The Mount,  
Lenox, MA

Ventfort Hall Mansion & Gilded Age Museum,  
Lenox, MA

Warren Historical Society,  
Warren, CT

West Stockbridge Historical Society,  
West Stockbridge, MA

## APPENDIX 7

### Documentation of the Planning Process

The Upper Housatonic Valley NHA began keeping records of public engagement over five years before formal designation. Note that while meetings have taken place throughout the NHA, the region's geographic center lies in Massachusetts, which therefore offers convenient locations for events of interest to stakeholders from throughout the heritage area. Public consultation supporting the development of this document included the events listed in the chart below.<sup>1</sup>

Year	Date	Location	Notes
2001	April 5	Great Barrington, MA	
	August 24	Dalton, MA	
	November 17	Stockbridge, MA	Jim O'Connell attended
2002	February 14	Pittsfield, MA	
	March 4	Pittsfield, MA	Brenda Barrett attended
	March 4	Stockbridge, MA	Brenda Barrett attended
	March 4	Canaan, CT	Brenda Barrett attended
	April 27	Pittsfield, MA	
2003	May 4	Sheffield, CT	
	January 15	Pittsfield, MA	
	January 16	Great Barrington, MA	
	January 17	Salisbury, CT	
2005	May 3	Sheffield, CT	
	January 12	Salisbury, CT	
2006	January 13	Pittsfield, MA	
2007	October 16	Lakeville, CT	Cong. Nancy Johnson attended
	February 20	Great Barrington, MA	
	February 22	Pittsfield, MA	
2008	March 1	Lakeville, CT	
	March 15	Alford, MA	
	May 15	Sharon, CT	
	May 20	Dalton, MA	
	May 22	Sheffield, MA	
	July 3	Warren, CT	
	September 23	Stockbridge, MA	
	November 13	Great Barrington, MA	
2009	December 16	Lenox, CT	
	January 29	Stockbridge, MA	Planning summit with partners
	March 10	West Cornwall, CT	
	March 30	Sharon, CT	
	July 21	Salisbury, CT	
	September 10	Stockbridge, MA	Trail symposium
	October 5	Pittsfield, MA	
	October 9	Lakeville, CT	
	October 21	Lakeville, CT	
	October 24	Stockbridge, MA	
2010	October 26	Sharon, CT	
	December 2	Stockbridge, MA	Alternatives meeting I
	January 29	Stockbridge, MA	Alternatives meeting II
	March 9	Stockbridge, MA	Alternatives meeting III

<sup>1</sup> Interview with Dan Bolognani, UHVNHA Executive Director, November 24, 2009 as well as UHVNHA records supplied by Bolognani.



## APPENDIX 7 *continued*

It is estimated that well over 1,000 citizens participated in these meetings.

In addition, UHVNHA's Trustees hold regular monthly meetings, usually on the second Thursday of each month, usually in Great Barrington. These meetings have occurred almost continuously since 2002. The Trustees also conducted three management planning retreats:

- January 16, 2004 (after the "suitability/feasibility" study had been completed, but before designation—with the NPS' John Monroe as moderator);
- February 8, 2006 (in the middle of the second designation legislative process—with Nancy Skinner and Jacques & Company as moderators/facilitators);
- April 19, 2007 (after designation and preparing for the official management planning process—again with the NPS' John Monroe as moderator/facilitator).

### Agency Contacts

MAP review plans include contacts with the following agencies and other interested organizations:

#### Historic Preservation Officers

##### STATE OF CONNECTICUT:

Karen J. Senich,  
*State Historic Preservation Officer*  
*Connecticut Commission on Culture & Tourism*  
One Constitution Plaza  
Hartford, Connecticut 06103  
Phone: (860) 256-2753  
Fax: (860) 256-2811  
E-mail: karen.senich@ct.gov

##### COMMONWEALTH OF MASSACHUSETTS:

Brona Simons,  
*Executive Director/State Historic Preservation Officer*  
*Secretary of the Commonwealth*  
Massachusetts Historical Commission  
220 Morrissey Boulevard  
Boston, MA 02125-3314  
Phone: (617) 727-8470  
Fax: (617) 727-5128  
E-mail: mhc@sec.state.ma.us

### 5.1.1 Federally -Recognized Tribal Nations

**Note:** There are no reservation lands within the Upper Housatonic Valley National Heritage Area's boundaries.

##### STATE OF CONNECTICUT:

Kathleen Knowles,  
*Tribal Historic Preservation Officer*  
Mashantucket Pequot Tribe  
PO Box 3180  
Mashantucket, CT 06339-3180  
Phone: (860) 396-6887  
Fax: (860) 396-6914  
Email: kknowles@mptn-nsn.gov

##### (COMMONWEALTH OF MASSACHUSETTS:

Bettina Washington,  
*Tribal Historic Preservation Officer*  
Wampanoag Tribe of Gay Head-Aquinnah  
20 Black Brook Road  
Aquinnah, MA 02535-9701  
Phone: (508) 645-9265 ext. 175  
Fax: (508) 645-3790  
Email: bettina@wampanoagtribe.net

### 5.1.2 Other Federal Agencies

##### U.S. Fish & Wildlife Service:

Marvin Moriarity,  
*Regional Director*  
Northeast Regional Office  
U.S. Fish and Wildlife Service  
300 Westgate Center Drive  
Hadley, MA 01035-9587  
Phone: (413) 253-8300  
Fax: (413) 253-8308  
E-mail: Northeast@fws.gov

##### National Park Service - Appalachian National Scenic Trail:

Pamela Underhill, *Park Manager*  
Appalachian National Scenic Trail  
P.O. Box 50  
Harpers Ferry, WV 25425  
Phone: (304) 535-6278  
E-mail: Pam\_Underhill@nps.gov

## APPENDIX 7 *continued*

### State Agencies

#### CONNECTICUT DEPARTMENT OF ENVIRONMENTAL PROTECTION:

Amey Marrella, *Commissioner*

Department of Environmental Protection  
79 Elm Street

Hartford, CT 06106

Phone: (860) 424-3009

E-mail: amey.marrella@ct.gov

William Hyatt, *Bureau Chief*

Bureau of Natural Resources

Department of Environmental Protection  
79 Elm Street

Hartford, CT 06106

Phone: (860) 424-3487

E-mail: william.hyatt@ct.gov

Thomas Tyler, *Division Director*

State Parks & Forests Division

Department of Environmental Protection  
79 Elm Street

Hartford, CT 06106

Phone: (860) 424-3099

E-mail: tom.tyler@ct.gov

#### MASSACHUSETTS DEPARTMENT OF FISH & GAME:

Mary B. Griffin, *Commissioner*

Department of Fish & Game

251 Causeway St., Suite 400

Boston, MA 02114

Phone: (617) 626-1500

E-mail: mary.griffin@state.ma.us

Russ Cohen\*, *Rivers Advocate*

Division of Ecological Restoration

Department of Fish & Game

251 Causeway Street, Suite 400

Boston, MA 02114

Phone: (617) 626-1543

E-mail: russ.cohen@state.ma.us

#### MASSACHUSETTS STATE PARKS & FORESTS:

Rick Sullivan, *Commissioner*

Department of Conservation and Recreation

251 Causeway Street, Suite 600

Boston, MA 02114-2104

Phone: (617) 626-1250

Fax: (617) 626-1351

E-mail: mass.parks@state.ma.us

### Regional and Local Agencies

#### REGIONAL PLANNING AGENCIES:

Christopher S. Wood

The Northwestern Connecticut Regional Planning  
Collaborative

(Oversight and management for this organization  
is provided through a partnership between the  
Northwest Connecticut Council of Governments and  
the Litchfield Hills Council of Elected Officials.)

Phone: (203) 558-0654

E-mail: chris@nwctplanning.org

Nathanial Karns\*, *Executive Director*

Berkshire Regional Planning Council

1 Fenn Street, Suite 201

Pittsfield, MA 01201-6629

Phone: (413) 442-1521

Fax: (413) 442-1523

E-mail: nkarns@berkshireplanning.org

### Other Interested Parties

Lynn Werner\*, *Executive Director*

The Housatonic Valley Association

P.O. Box 28

150 Kent Road

Cornwall Bridge, CT 06754

Phone: (860) 672-6678

Fax: (860) 672-0162

E-mail: conn@hvatoday.org

P.O. Box 251

1383 Route 102

South Lee, MA 01260

Phone: (413) 394-9796

Fax: (413) 394-9818

E-mail: mass@hvatoday.org

## APPENDIX 8

### Summary of Impact Issues Raised by Public

#### Resource Inventory & Assessment

**Cultural Landscapes** – A request to duplicate the assessment of significant cultural landscapes and its components in the Connecticut portion of the Heritage Area was made. Such an inventory has already been conducted by the Massachusetts Department of Conservation and Recreation, with support from local municipal governments.

**Industrial Archeology** – The need to identify sites of past industry in the region for historical documentation was raised. Several themed tours have already been established for the NHA and additional sites could be added or additional themes developed. (An industrial archeology project that will record such sites within the heritage area was also discussed.)

**Scenic Byways** – Interest in conducting a study of potential scenic road corridors in the region was expressed. Pursuing National Scenic Byway designation could bring additional programmatic resources and funding to the Housatonic Heritage effort. Two designated scenic roadways are currently located in the Massachusetts portion of UHNHA.

#### Resource Monitoring

**Stream Flow/Volume** – Issues regarding water flow and volume were raised suggesting that the Housatonic River and its tributaries should be monitored. One specific concern was expressed regarding the current practice of private companies using river water to fill tank trucks for swimming pools and irrigation. Although not currently a substantial problem, unregulated use of water resources may eventually affect recreational use and aesthetics of the river and its tributaries.

**Water Quality** – The pending remediation work and cleanup of the Housatonic River associated with the General Electric plant in Pittsfield has heightened local awareness regarding water quality and point source pollution in the region's water bodies and aquifer. Although monitoring sites have been established for the cleanup project the lingering, long term effects of contaminants is of great concern to those who

reside in the Housatonic watershed.

**Wildlife Corridors** – It was noted that there is potential for monitoring wildlife movement along

recognized corridors and, in some capacity, addressing the obstacles that block or limit wildlife migration within and through the region. Maintenance of healthy wildlife populations is recognized as important to certain recreational interests in the UHVNHA—whether for observation, hunting, or fishing.

**Air Quality** – The overall impression from those who provided input is that air quality in the region is good most of the time, although a general concern about acidic precipitation was expressed. Rainwater with low pH (high acidity) can have a detrimental effect on forest, wildlife and historic resources.

#### Resource Protection

**Riparian Zones** – The need to restrict development in flood plains and adjacent to rivers and streams has been identified as an issue of regional importance. Implementation and enforcement of a “no build” zone maintains a level of safety, water quality, and aesthetics for waterways. The Housatonic Valley Association, a nonprofit dedicated to the health of the Housatonic watershed, has developed a plan to address this issue and each municipal government is being approached regarding its implementation.

**View Sheds for Steep Slopes & Ridgelines** – The need to restrict development on the top of ridgelines and on steep slopes has been identified as an issue of importance. When buildings and structures are allowed on ridgelines and steep slopes, the appearance of the natural landscape is diminished and problems with erosion are created. The Housatonic Valley Association has developed a plan to address this issue and each municipal government is being approached regarding its implementation.

**Wetlands Conservation** – Participants stated that efforts should continue to prevent fragmentation of wetlands from the larger regional hydrological ecosystem. A healthy system of wetlands allows for prime recreational opportunities, fosters healthy wildlife populations, creates prime fishing waters, filters

## APPENDIX 8 *continued*

pollutants in runoff, and protects property. Success has been demonstrated through property purchase and conservation easement acquisition. This issue is also being addressed as part of the “Greenprint” initiative in Connecticut led by the Housatonic Valley Association. Regional data on natural resources has been assembled and made available to local governments to assist decision makers in making educated decisions about proposed land development projects.

**Aquifer Protection** – The safety and protection of potable water supplies is a primary objective of land acquisition programs for several public and private entities. Considerable acreage has already been acquired in the NHA adjacent to surface reservoirs and containing productive aquifers as sources of drinking water for jurisdictions within and outside of the region. Other passive use and open space preservation objectives are achieved when land is purchased for this reason.

**Conservation of Prime Farmland** – Loss of tracts of farmland to suburban or rural residential development is a problem in the region. The issue is being addressed as part of the “Greenprint” initiative in Connecticut led by the Housatonic Valley Association. Regional data on natural resources has been assembled and made available to local governments to assist in making decisions about proposed land development projects.

**Forestry Conservation** – A concern was expressed that private land tracts are being clear-cut in

Massachusetts that results in habitat disruption and unsightly appearances. On the other hand, logging is a source of income for private property owners that helps to pay property taxes. It was suggested that encouraging and enforcing the use of forestry Best Management Practices would help strike a balance between properly managing the natural resource and recognizing the rights of property owners.

### **Resource Enhancement**

**Historic Barn Reuse** – The region’s aging stock of barns are in a state of disrepair and disuse. It was suggested that a program should be developed that

would result in the repair and reuse of the region’s historic barns thereby halting this disturbing demolition trend.

**Wayfinding** – A well-planned and designed system of directional signs and associated promotional literature for the region’s heritage and cultural attractions is frequently mentioned and one of the primary objectives of the UHVNHA.

### **Resource Remediation**

**GE’s Housatonic River Site** – Concerns were voiced about the appearance of the Housatonic River corridor and the disposal of contaminants during the planned remediation of the General Electric site in Pittsfield, MA. It was also noted that the cleanup will have a positive impact on the heritage area over the long term, specifically creating a cleaner environment.

**Invasive Species** – Concern over controlling the spread of invasive species in the region was mentioned along with the need to encourage biodiversity. A program to promote use of native species in commercial and residential landscaping was also suggested. Specific plant and animal species listed as a problem in the region include, but may not be limited to, the European starling, Zebra mussel, Asiatic bitter-sweet, Japanese barberry, Garlic mustard and Asian long-horned beetle.

### **Resource-Based Recreation**

**Resource Overuse** – Concern was expressed about high volume visitation at popular sites and attractions having a detrimental impact on resource conditions. Sustainable thresholds for resource visitation and use should be established so that overuse is avoided. Either access to resources can be restricted or access infrastructure improved depending on local conditions, nature of use, and durability of the resource.

**Housatonic River Greenway** – An emerging project among organizations in the region is to create a greenway consisting of interconnected conservation lands and trails along the Housatonic River. Project planning is underway with the aim to include representatives from every town along the river in the preparation and development of the concept.



## APPENDIX 8 *continued*

**Hiking Trails** - It was suggested by several parties that a network of smaller trails should be planned and developed in the region. Specifically, trails that form a series of loops that an average hiker could complete in an afternoon or a day.

**Fishing and Hunting** -- Fishing and hunting are legitimate recreational activities that should be featured and promoted by the heritage area as part of a regional experience.

**ATV & Snowmobile Trails** - Although concerns were expressed about the impacts of ATV use on the environment, suggestions were made to continue allowing ATV use at current levels (Massachusetts allows ATV use in designated areas and Connecticut does not). It was noted that snowmobiles do not impact the environment in the same way as ATVs and that the development of regional snowmobile trails should be encouraged in the heritage area.

### ***Land Use and Growth Management***

**Community Supported Agriculture** - A concern over the loss of farms as viable, operating businesses and the loss of the historic agricultural landscape was expressed. A desire to encourage and promote locally grown and processed agricultural products was enthusiastically endorsed and discussed, but no comprehensive, organized effort has been initiated. The need for a local slaughterhouse to process livestock was specifically mentioned.

**Land Use and Suburban Sprawl** - Concern was expressed over how the successful promotion of the heritage area might lead to increased land development and suburban sprawl. A corollary concern was that Housatonic Heritage activities may significantly amplify the popularity of the region and thereby increase vehicular traffic on local roads and introduce large numbers of tour buses. An increase in demand for residential development, especially where the existing two-acre development model prevails that rapidly consumes rural landscapes, will accelerate commercial development as well. Participants indicated that there are not sufficient land use development regulations and controls in place to guide growth and retain the rural character of the region.

It was noted that there is a need to implement smart growth policies.

**Areas Outside of the Heritage Area** - Concern was expressed about the spread of development

associated with the widening of Route 22 and extension of commuter rail service in Dutchess County, New York immediately to the west of the NHA. The call for a regional approach to land use planning was made.

**Land Acquisition and Preservation** - A consensus among participants was that efforts to protect prime farm, forest and watershed land for conservation purposes (fee simple and less than fee simple) should continue. Several land parcels have been targeted for future acquisition such as the Skiff Mountain tract. It was stated that 35% of Berkshire County, Massachusetts is currently under some form of land protection such as public ownership, land trust ownership or conservation easement. A goal of increasing that amount by 10% over the next ten years was stated.

**Sustainability as a Primary Goal** - It is important to several individuals and organizations that that implementation of the heritage area facilitate the balance of conservation objectives with heritage development and tourism objectives.

### Structure of Board of Trustees and Council of Overseers

**(A) The management entity is representative of the diverse interests of the Heritage Area, including governments, natural and historic resource protection organizations, educational institutions, businesses, and recreational organizations;**

The Housatonic Heritage Management Plan includes implementation strategies in cooperation with a broad array of state and local governmental entities, natural and historic resource protection organizations, educational institutions, businesses, and recreational organizations.

Additionally, the governing bodies of the Upper Housatonic Valley National Heritage Area represent the diverse interests of the region. This broad representation on the Board of Trustees and the Council of Overseers is required in the organizational bylaws, and insures representational continuity for the future.

#### **Board of Trustees** – as of February 2013:

Shep Evans (Feb 2017)

- Past President & Current Board Member - Stockbridge Land Trust
- Board Member, VP Massachusetts, Chmn. Water Protection - Housatonic Valley Association
- Former Board Member - Mass Association of Conservation Commissions

Rachel Fletcher (Feb 2014)

- Founding director of the Housatonic River Walk in Great Barrington, MA
- Co-director of the Upper Housatonic Valley African American Heritage Trail
- Director of Friends of the W. E. B. Du Bois Boyhood Homesite

Paul W. Ivory (Secretary) (Feb 2014)

- Chairman, Great Barrington Historical Commission
- 30 years for the National Trust for Historic Preservation as director of Chesterwood, in Stockbridge, MA

Ronald D. Jones (Treasurer) (Feb 2015)

- Former Chairman, Upper Housatonic Valley National Heritage Area
- Board of Directors, Salisbury Association

Edward Kirby (Feb 2015)

- Former teacher and principal - Housatonic Valley Regional High School
- Historian and author of several books, including “Echoes of Iron” and the animated DVD “Visions of Iron”
- President, Friends of Beckley Furnace, CT’s only industrial monument.

Steve McMahon (Chairman) (Feb 2014)

- Executive Director, Hoosic River Watershed Association
- Former Western Region Director, The Trustees of Reservations

Raymond Murray (Feb 2016)

- Business person

Kathy Orlando (Feb 2015)

- Executive Director, Land Protection at Sheffield Land Trust

Dennis Regan (Feb 2015)

- Berkshire Director at Housatonic Valley Association

Stephen Sears (Feb 2016)

- Owner, greenThink L.L.C. - Sustainable Development Consulting
- Former V.P. Manufacturing, Engineering & Environmental Services - Crane & Company

Phil Smith (Vice Chairman) (Feb 2016)

- Lee, MA Cultural Council
- Lee, MA Historical Society
- Lee, MA Chamber of Commerce
- Former educator and administrator

Christine Ward (Feb 2015)

- Great Barrington Land Conservancy / Trails & Greenways

Council of Overseers – 2013

- Megan Whilden, Director of Cultural Development, City of Pittsfield
- Ursula Cliff, President, Egremont Land Trust
- Nancy Fitzpatrick, Co-Chairman, Berkshire Creative
- Nat Karns, Executive Director, Berkshire Regional Planning Commission
- Dave Klausmeyer, Past Chairman, Berkshire Taconic Community Foundation
- Lauri Klefos, President & CEO, The Berkshire Visitors Bureau
- Peter Lafayette, Foundation Executive Director, Berkshire Bank Foundation, Inc.
- Monica Joslin, Dean of Academic Affairs, Mass College of Liberal Arts
- Erik Bruun, Chairman, Railroad Street Youth Project
- David Heck, Salisbury Association
- Gordon Ridgway, First Selectman, Town of Cornwall CT
- Ward Belcher, H To H Educational Collaborative
- Richard Aldrich, Sr. VP, Salisbury Bank & Trust
- Laurie Norton Moffatt, Director & CEO, Norman Rockwell Museum
- Jennifer Dowley, President, Berkshire Taconic Community Foundation
- Skip Mattoon, Former Head of School, The Hotchkiss School

**(B) The management entity has afforded adequate opportunity, including public hearings, for public and governmental involvement in the preparation of the management plan.**

From 2001 – 08 nearly two dozen public meetings were conducted as Housatonic Heritage sought to create a management plan that was inclusive of and reflective of the 29 communities served. Documentation of the meetings is located in Appendix 7.

**(C) The resource protection and interpretation strategies contained in the management plan, if**

**implemented, would adequately protect the natural, historical and cultural resources of the Heritage Area.**

The governing bodies of Housatonic Heritage include the Board of Trustees and the Council of Overseers (as noted above). Each of these groups has had input and oversight on the development of the Management Plan, and have endorsed the current draft as the preferred means for conserving and preserving the heritage assets of the Upper Housatonic Valley.

**(D) The management plan is supported by the appropriate state and local officials whose cooperation is needed to ensure the effective implementation of the State and local aspects of the management plan.**

This success made the idea of achieving National Heritage Area designation for the Connecticut side of the Upper Housatonic Valley region, first explored in 1999, seem more attainable. That summer, Senator Joe Lieberman and Congresswoman Nancy Johnson agreed to initiate the designation process. In August, 1999, National Park Service staff, personnel with the National Trust for Historic Preservation, employees of the Connecticut Historical Commission and representatives of Congress.

Congresswoman Johnson visited the region and toured historical sites and museums. As discussion continued, the notion of organizing the heritage area around “14th Colony” or the “Lost Colony” interpretive themes emerged. Ed Kirby, educator and author, noted that a map of the Salisbury Iron District and the watershed of the upper Housatonic River were almost co-terminus, covering both the Litchfield Hills in Connecticut and the Berkshires in western Massachusetts: the story demanded transcending state lines.

In early 2000 Massachusetts Congressman John Olver agreed to co-sponsor a feasibility study for the proposed bi-state National Heritage Area, eventually authorized under Public Law 106-470.

## APPENDIX 9 *continued*

Current State legislators have endorsed the process and the implementation policies as described in the Management Plan. Attached are letters from State legislators who represent the districts in which the Upper Housatonic Valley National Heritage Area is located:

- MA State Representative Smitty Pignatelli (D-Berkshire 4<sup>th</sup> District)
- MA State Senator Ben Downing (D-Berkshire 1<sup>st</sup> District)
- State Representative Roberta Willis (D-CT 64<sup>th</sup> District)
- State Senator Clark Chapin (R-CT 30<sup>th</sup> District)

This Management Report has been prepared cooperatively by Housatonic Heritage and the National Park Service's Northeast Regional Office.





is proud to partner with the **Housatonic National Heritage Area** to help visitors discover the historic, cultural and scenic resources in the Berkshires of Massachusetts.



### 2012 Strategic Marketing Partnership Housatonic Heritage & Berkshire Visitors Bureau

2012 marks the third year of a collaborative marketing package provided by the Berkshire Visitors Bureau (BVB) to achieve goals with the Upper Housatonic National Heritage Area and to take advantage of the Heritage Area's ability to use a regional perspective to market effectively and retain the region's vibrancy.

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#### 2012 PROPOSAL

The main focus for 2012 is to increase public awareness of regional heritage related activities through the BVB's extensive contact network. Specifically, throughout the year three areas will receive promotional pro-active outreach using the expertise of the Visitors Bureau – **thematic or physical trails, biking, and history.**

Housatonic Heritage has been successful in researching and documenting the region's historic, cultural and scenic resources throughout the Heritage Area. Existing printed materials and a website at [www.HousatonicHeritage.org](http://www.HousatonicHeritage.org) contain valuable information in an easily accessible format. The Visitors Bureau will provide access to an interested and pre-qualified audience to increase awareness of the Heritage Area and use of their information.

Promotion of two well developed themes - the Heritage Walk Weekends which offers over 50 guided walks over two weekends, and the African American History Trail which successfully documents the importance of the region in preserving and celebrating African American heritage enable the Housatonic Heritage Area to maintain visibility for the organization. This proposal successfully ensures the delivery of that message.

In addition, providing support for the emerging Bike Path Initiative and the possible connection of local Historic Associations will enable the Housatonic Heritage Area to gain leverage in the marketplace. The BVB audience can help in the testing of new themes and supporting materials, thereby integrating all aspects of the Upper Housatonic River Valley – the social, cultural, economic and industrial history of the valley, the ecology of the river throughout that history and the symbiotic relationship between that history and ecology.

**2012 Program Deliverables:** In 2011 the BVB/Housatonic Heritage/BVB partnership resulted in over 965,000 impressions. In order to improve the mechanics of this year's program, the BVB's 2012 proposal includes the use of a graphic designer to develop all needed ads (print and online). The designer will be overseen and paid by the BVB with all designs subject to approval by Housatonic Heritage. In addition, the Visitors Bureau recommends the following:

**Membership:** Upon renewal of its base membership, the Housatonic Heritage Area will receive up to four additional secondary memberships for its African American History, Paper Trail, Housatonic Bike and Heritage Walks to increase number of listings both on the Berkshires.org website and in printed Official Berkshire Visitors Guide.



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### **Marketing Services:**

#### **Advertising**

- Include 1/8 pg BW display ad in BVB's Official Berkshire Visitors Guide for 2012 (Value: \$1089)

#### **E-Communications**

- Include articles, written by HH in 4 monthly e-blasts (Value: \$11,000)
  - June consumer e-newsletter-54<sup>th</sup> Regiment
  - Aug consumer e-newsletter-Heritage Walks
  - June Trade e-newsletter-How groups can enjoy the Heritage Area
  - Aug Fuel Saver e-blast-Bike the Berkshires
- Include ad in 2 online CRM e-blasts to all markets (Value: \$2860)
  - April
  - Oct
- Include ad in 2 online Fuel Saver e-blasts (Value:\$440)
  - March
  - Aug
- Create and send 1 Housatonic Heritage Exclusive e-blasts (45,000 email addresses) focus on Heritage Walks (Value : \$2500)
  - End of August send
- Include tile ad in Member to Member newsletter six times per year (Value: \$3300)
- Include website link on BVB Face book pages once per month for 12 months (Value: \$3300)

#### **Website**

- 1 Leader Board Banner ad on berkshires.org, home page for one month (Value: \$1500)
  - Month to be mutually decided upon.
- Bottom Banner ad on berskshires.org, run of site for entire year (Value: \$1200)
- Display Ad on Plan Your Trip and Living Here pages on berkshires.org for entire year (Value: \$4700)
- Include all events on BVB Event Calendar and What's New Section (Value: \$5500)
- Tagline about partnership on homepage with link to HH website. (Value: \$38,500)

#### **Design**

- All design elements will be created by a BVB recommended contract designer who will work with the BVB and Housatonic Heritage to create all the necessary design deliverables in this contract. (Value \$2000)

**Inquiry Fulfillment:** The final element that the Berkshire Visitors Bureau can offer Housatonic Heritage is distribution of materials, should you want to broaden distribution of waterways and heritage walks brochures, or any other printed collateral. The BVB can include these pieces with its Visitors Guides during specific months and in specific quantities negotiated. The cost of extra postage for a specific quantity of pieces will be estimated separately.



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**Matching Funds:**

All of the Berkshire Visitors Bureau marketing programs include partners whose dollars will be used to match funds from Housatonic Heritage. In FY11 this investment from private industry equaled **\$443,305**.

**Price:**

\$15,000 for calendar year 2012; payable in two installments in January and June 2012.

**Measuring Success:** The Berkshire Visitors Bureau is the official destination marketing organization for Berkshire County. The mission of the Berkshire Visitors Bureau is to stimulate year-round interest and visitation to the Berkshires through overnight travel, increased attendance at attractions and patronage of area businesses for the continual economic benefit of the region.

Our audiences include:

- 650 Members from throughout Berkshire County and surrounding areas.
- 1,400,000 user page views annually of the Visitors Bureau's website at [www.berkshires.org](http://www.berkshires.org).
- The Visitors Bureau's pre-qualified email list currently includes 45,000 addresses.
- The Visitors Bureau's Facebook subscribers totals over 8,400 fans
- 150,000 Official Berkshire Visitors Guides distributed to visitors (in response to online requests and at locations throughout Berkshire County, Northwestern Connecticut, Columbia County, as well as the Albany and Greater Saratoga NY Regions).

\_\_\_\_\_  
Lauri Klefos  
President/CEO  
Berkshire Visitor Bureau

\_\_\_\_\_  
Date

\_\_\_\_\_  
Dan Bolognani  
Executive Director  
Upper Housatonic Valley National Heritage Area

\_\_\_\_\_  
Date

## APPENDIX 11: UPPER HOUSATONIC VALLEY NATIONAL HERITAGE AREA INTERPRETIVE PLAN

*Sportsmen, historians, anglers, environmentalists, outdoorsmen, property owners, residents, commercial users, canoeists, birdwatchers, casual hikers, and others all see themselves as constituents of the river.*

– The Housatonic River Restoration Plan, 1999



*Housatonic River Valley view from October Mountain State Forest, courtesy of Diane Cote.*

### 1.1 Introduction

Everyone who lives, works, and visits the region is a constituent of the Housatonic River, its surrounding landscape and its shared heritage. Housatonic Heritage's goal is to ensure that all constituents all have equal access to learn about, enjoy, and explore that heritage. This Interpretive Plan provides the blueprint for making that happen.

When Housatonic Heritage gathered small groups of its partners and stakeholders together for **interpretive roundtables** in January 2014, the idea of a regional interpretive plan was met with great enthusiasm. The partners and stakeholders brainstormed and offered updated ideas which were later prioritized by the trustees into a short list of action items (Section 10). The interpretive

roundtables were so useful that attendees called for similar quarterly gatherings to continue the dialogue about shared visions, issues, and solutions.

### 2.1 Significance of the region

The Upper Housatonic Valley National Heritage area is comprised of 29 towns in northwestern Connecticut and southwestern Massachusetts. The region contains three ecosystems (Western New England Marble Valley, Berkshire Taconic Landscape, and Lower Berkshire Hills) which support 200 rare plant and animal species.

The valley's present-day picturesque landscape belies a frequently turbulent history of conflict, struggles for freedom, and environmental degradation. In the seventeenth and eighteenth centuries, early white settlers pressured Indians off



## APPENDIX 11: UPPER HOUSATONIC VALLEY NATIONAL HERITAGE AREA INTERPRETIVE PLAN *continued*

their land and schooled them in Christianity. None remain in the region today. In the valley's sparsely settled communities within the rugged hills and along the river, residents who had supported the American Revolution joined Shays' Rebellion when their hopes for freedom were not realized by the new U.S. government. Following the Revolution, a Sheffield slave won her freedom in a landmark legal case that effectively ended slavery in Massachusetts. Seventy-five years later, in 1868, W. E. B. Du Bois was born in Great Barrington, "by a golden river," as he later described the Housatonic.

While the eighteenth and nineteenth-century iron ore, marble, woolen, and paper industries made the region nationally prominent, they played havoc with the environment by opening mines and quarries, clear-cutting forests for fuel and grazing, and damming and polluting the Housatonic and its tributaries. By the early twentieth century, it was the electrical equipment industry, initiated with discoveries by William Stanley, which made the region famous and profitable; however, the clean-up of the toxic residue in the river is an ongoing struggle today.

About 150 years ago, the valley's hills, open farmland, and meandering rivers and streams attracted writers and artists who found inspiration in the natural setting. Vacationers and the social elite from Boston and New York soon followed and bought up the less-than-profitable farms for great estates. Wealthy art patrons built enormous summer homes and turned the region into a world renowned cultural center, particularly for music, art, and literature. Today, that cultural center fuels the economy.

It is these stories of the intersection of the land, human activity, and the quest for freedom that will be explored with a widening audience.

### 3.1 Planning Process

While focused efforts towards the Interpretive Plan didn't begin in earnest until the Management Plan was completed in June 2013, region-wide interpretation began twelve years earlier in 2001. Each year from 2001 to 2013, Housatonic Heritage and its partners collaborated on close to 100

programs ranging from hour-long heritage walks and interpretive paddling trips to a week-long course for teachers. The development process for the Interpretive Plan took these steps:

1. In fall 2013 staff assembled a list of ongoing programs and new projects that had been "on the table" as desirable future projects consistent with the unstated, but widely accepted, interpretation goals for the region. Although never given a formal "green light," these projects enjoyed general support, and had been identified through the management planning process as desired alternatives for Housatonic Heritage.
2. To evaluate and prioritize the list of "on the table" projects, Housatonic Heritage hosted two interpretive roundtables in January 2014, plus several one-on-one meetings with key stakeholders. At these lively sessions, museum and nature site directors, arts programmers, interpretation directors, an NPS representative, and community college staff heartily endorsed the existing interpretive goals for Housatonic Heritage's desired future described in Section 8. Then, participants proposed fresh ideas for adding or revising action steps to reflect current thinking and available technology. This new list of collaborative and inventive projects was subsequently prioritized by the Board of Trustees.
3. In March 2014, through an online survey, trustees narrowed the list of 45 projects to a list of 14 priorities. Housatonic Heritage held a follow-up conference call with trustees to ensure that they were indeed the top priorities for the organization. During that discussion, some new projects were combined and others were sequenced; all matched the goals of the organization and meshed with other ongoing programs. Therefore, the Action Items listed below in Section 10 are the result of the work of staff, the stakeholders and partners who participated in the interpretive roundtables, and the Board of Trustees.

#### **4.1 Interpretive Framework**

Housatonic Heritage's interpretive framework is based around four key interpretive themes that were identified in the 2002 Feasibility Study conducted by the National Park Service. In 2012 these four themes were broadened to better reflect the evolution and increased breadth of the heritage area's research interests and programming. The four key themes are these:

##### **4.2 Creating a Cultural Center**

The power of nature to rejuvenate and inspire led the Upper Housatonic Valley to become a nationally recognized center for the literary, visual, and performing arts. Independent-minded artists at the forefront of their fields found homes among the scenic landscape, opportunity for experimentation, and sophisticated audiences for their works.

The proximity to major urban centers attracted America's most notable writers, performers, and artists, among them Herman Melville, Nathaniel Hawthorne, Edith Wharton, Norman Rockwell, and Daniel Chester French. In the late 19th century, wealthy industrialists and financiers built 75 ostentatious "cottages" for summer homes. These wealthy families patronized the arts and inspired vacationers in the upper and middle classes to take in the fresh air while they enjoyed celebrated music and art. Housatonic Heritage encompasses Tanglewood, Jacob's Pillow Dance Festival, and a thriving creative economy.

##### **4.2 Connections to the Land**

The Upper Housatonic Valley has been devastated by centuries of extractive industry, but over time and through activism and dedicated conservation efforts, its reclaimed and restored historical, agricultural, and scenic landscapes are at the core of the region's identity and economy. The restoration of the Housatonic River remains an ongoing struggle.

By the 1720s, Native Americans were pressured off the land and replaced by Englishmen who farmed and grazed livestock. The trees that farmers didn't clear-cut were removed by the



*Daniel Chester French's Studio at Chesterwood, Stockbridge, MA.*

iron industry to burn for charcoal to fuel iron furnaces. More trees were cut by the wood pulp paper-making industry. By 1850, three-quarters of the region was deforested. Factory owners dammed the Housatonic and built reservoirs on its tributaries for waterpower. In the early 20th century, as factories and farms declined, the wealthy "cottage" owners bought up huge tracts of land to create scenic vistas. When the tax laws changed, many estates became state parks. Conservation advocates took the lead in preserving other lands. Today, three-quarters of the land is covered with trees. Beginning in the 1980s, Community Supported Agriculture has returned vacant farmland to active farming.

##### **4.3 Cradle of Industry**

Innovation in the iron, wool, paper, and electricity generation industries led to prosperity as well as to exploitation of natural resources and pollution. The 21st century ushered in an era of economic distress that has been partially relieved by the development of an economy based on artistic

creativity and on the preservation and enjoyment of restored natural resources.

Two of America's earliest industries, iron and paper, were rooted in the Upper Housatonic Valley. In the mid-19th century, at the peak of production, there were 43 blast furnaces in the district making use of the region's high grade iron ore. They made armaments for the Revolution and later wheels for locomotives. In 1801 Zenas Crane established a paper making company that used nearby lime deposits in the rag bleaching process and Housatonic's pure water to clean paper. Today, the Crane Company still makes paper for U.S. currency. The electric transmission industry was centered in Pittsfield where General Electric purchased a plant; when it partially closed in the late 1970s as many as 10,000 jobs were lost, and the local economy was devastated.

#### **4.4 The Pursuit of Freedom and Liberty**

Since before the founding of the nation, many significant events that ushered in new eras of personal and political freedom, religious tolerance, enfranchisement, and civil rights took place in the Upper Housatonic Valley. In the eighteenth century, valley inhabitants denied human rights to local Native American and to African Americans they enslaved.

In 1783, Sheffield resident and slave "Mum Bett" brought a lawsuit against John Ashley in which she sued for her freedom. When the courts granted her freedom it became a landmark case; other Massachusetts slaveholders knew that their rights to hold slaves were indefensible under the new Massachusetts Constitution. With the ruling of this case and another, slavery died out in the state. During the same era, as religious feeling intensified, the Shakers set up a large utopian community in Hancock where they purchased 3,000 acres. By 1830 a total of 300 Believers lived there. The leader of the modern civil rights movement W.E.B. Du Bois spent his earliest years in Great Barrington and retained a deep affection for the town.

The themes are further explained in the Management Plan, specifically in Sections 2.6 (pages 14 to 21) and in Appendix 3 where matrices for each of the interpretive themes contains a cross-reference of detailed interpretive concepts and ideas with site-specific topics and stories.

The four key themes are conveyed through a wide variety of interpretive techniques. In 2013, they included tours, lectures, guided walks, trails signs, bike and hike trails, motor coach tours, riverwalk signage, paddling guides, books, podcasts, performances, and exhibitions. Currently, sites in the region are developing an animated DVD on iron production, a smart phone app designed to provide an interactive experience, and the use of interpretive re-enactors at historic sites.

#### **5.1 Housatonic Heritage's Desired Future**

In ten years, the heritage area will have a multidimensional audience which will include full-time residents as well as visitors, young and, affluent and non-affluent people, and those with diverse ethnic backgrounds. Specifically, the desired future for Housatonic Heritage interpretation encompasses three elements:

**5.2 First is the desire for a "visitor centered" heritage area achieved through increased engagement of the people who live in the region year round.** Within this vision is the expectation that more diverse local audiences—young, old, and of various ethnicities and economic groups-- will not only see themselves reflected in heritage offerings but also will have the opportunity to actively engage in planning heritage programs that enhance their lives. The assumption is that the tourists and seasonal residents already take full advantage of heritage activities; in fact, these activities are a key reason for the visitors' presence. In addition, it is an accepted truth in natural and historic heritage education, that when young people have the opportunity to get on the river or care for artifacts, they become stewards of heritage preservation and education as their lives move forward. A substantial portion of heritage education and the development of stewardship in

the Housatonic Valley must to be directed toward our young people.

**5.3 Secondly, Housatonic Heritage sees its future as being the catalyst organization that unlocks the potential for region-wide organizations of all sizes to increase activities and audience.** As an umbrella organization that works collaboratively to facilitate and exchange ideas and services, Housatonic Heritage will help modernize communication by introducing the how-to of using digital media and the opportunity to join Housatonic Heritage's digital forward motion. Specifically, Housatonic Heritage will serve as the catalyst for change by offering an investment of resources such as a well-timed infusion of funds.

**5.4 Thirdly, Housatonic Heritage envisions a future in which it tackles the behind-the-scenes work to promote region-wide themes and interdisciplinary learning.** Housatonic Heritage will assemble the key players in the disciplines of culture, art, history, and science so that they can discuss how visitors might learn about region-wide themes, relationships among the sites, and interdisciplinary connections. Moreover, Housatonic Heritage will take a leadership role in creating and hosting the premier website for all heritage activities and sites.

## **6.1 New Vision/New Audiences**

Baseline data about visitors is essential to measure the success of efforts to increase audiences. Yet, Housatonic Heritage knows of no single number of visits to the heritage sites in the region. Some sites boast tens of thousands while others serve a few hundred. Other resources, like hiking trails, have no formal entrances where visitors can be counted. Yet, observation and input from partner organizations describes an audience is largely homogeneous, middle class, and white. If Housatonic Heritage is to reach new audiences, one goal must be to provide the data needed to assess current audiences and to estimate the populations that are not reached.

In other words, accepting "new vision/new audiences" means that Housatonic Heritage must either

become the organization that does the work, or become the conduit to the organization, that is expert in market research to inform audience development. This would include baseline profile and information about the desired audience. Further, focus groups or surveys will be needed to understand how to deepen the commitment from the current customer base by identifying additional ways to serve them.

The 2010 U.S. Census indicates that 131,219 people live in the region, with the overwhelming majority (93% - 128,405) being Caucasian or white. Other ethnic groups include Hispanic/Latino (<1% or 4,530), Black or African American (<1% or 3,572) and Asian (<1% or 1,611). All other ethnic backgrounds, or those who identified themselves as having two or more races, make up the balance.

Given the lack of ethnic diversity, virtually all of the interpretive materials produced in the region are geared to an English-speaking audience. And, it remains likely that interpretive programming will continue to be developed for the predominantly white, English-speaking residents. However Housatonic Heritage has a unique opportunity to reach an ethnically diverse audience as we create programming specifically targeted to youth--an audience that transcends all ethnic and socio-economic groups.

Of greatest importance to interpretive programming is age-diversification. Of the region's total population, 15.4% (23,563) of residents are between the ages of 5-19. This age group (includes kindergarten through 12<sup>th</sup> grade) has been repeatedly identified by Housatonic Heritage programming partners as a desirable audience. This impressionable and frequently underserved age group has been sought after as a means of engaging family members, extended family, and as a means of building long-term relationships and stewardship for heritage assets.

One of the challenges faced by the region's heritage institutions is that substantial audience and visitation data for events, programs, and activities has not been compiled regionally since 2000, making any existing data outdated. Most partner organizations don't have the resources to capture visitor data and can



only provide anecdotal evidence of their audience at events and activities.

There has been limited success to engage youth through school-based programs and school field trips. Due to the evolution of Common Core teaching requirements, it has been widely recognized that the number and frequency of school programs will continue to dwindle. A core concept of this Interpretive Plan “Engage Youth” will be developed in concert with educators, interpretive programmers of partner organizations (the proposed Education Summit), and through collaboration with Housatonic Heritage as a regional coordinator.

Housatonic Heritage proposes to help reinvigorate a program sponsored by 1Berkshire called the Berkshire Audience Initiative (BAI). Currently dormant because of lack of funding, the partners who spearheaded the establishment of the BAI include the City of Pittsfield, the Berkshire Chamber of Commerce, and the Berkshire Visitors Bureau. Housatonic Heritage’s role would be to bring additional partners to the table, including possibly the Western Connecticut Convention and Visitors Bureau, and to provide some financial resources to help get the program up and running.

### **7.1 Challenges in Interpreting the Region**

While the region offers untold potential for interpretation and collaboration, there are challenges created by geography, available technology, and the nature of tourism in America.

**7.2 The region’s sixty-mile length is a substantial distance for partners to travel** for in-person collaboration and research. While digital connections make communication easier over long distances, in-person meetings are better at fostering working partnerships. Typically, visitors cannot comfortably travel the entire length of the region in one day if they stop for programs along the way.

**7.3 Cell and internet service are spotty.** For example, there is no cell service in downtown Stockbridge, the region’s biggest art and cultural center. As a result, Housatonic Heritage partners

find it essential to continue to produce print brochures.

**7.4 There is a distinct lack of diversity in the tourist population** in the U.S., in general. Not surprisingly, then, the scenic and cultural attractions entice a seasonal (summer and autumn) audience that is comprised largely of white adult visitors and vacationers, as well as affluent second- home owners from the New York and Boston areas. The staffs of heritage sites often expend most of their budgets and energy serving the large seasonal audience, leaving little for the smaller numbers of less affluent multi-aged year-round, ethnically diverse, residents.

### **8.1 Goals for Interpretation**

Following are three goals for interpretation for the Housatonic Heritage region for the next five years that, when followed, will ensure that the desired future is achieved. If new proposals do not advance these goals they will not be considered.

#### **8.2 Increase and broaden the region’s audience**

by spearheading and supporting audience research and providing a top-notch website that promotes all programs and links all sites. Housatonic Heritage’s role will be:

- developing a deeper knowledge of our current and desired audience base and assist organizations as they evaluate efforts to increase audience participation
- focus on development of the Housatonic Heritage website as the region’s premier source for all heritage programs and opportunities
- participate in region-wide efforts to increase youth visitation through web-based activities.
- Create links and story lines among heritage sites that are thematically similar.

Programming ideas related the interpretive themes identified in the Management Plan (Appendix 3 – Creating a Cultural Center) that would bolster ongoing efforts to broaden the region’s audience include:



*Paddling in Hinsdale Flats*

- Explore and discuss the Upper Housatonic Valley's contributions to and impact on American art and artists, the American identity, and national consciousness.
- Explore the history and artistry of the artists of the Upper Housatonic Valley. Put each into context and include notable works and performances. (Cross-pollination of themes to engage audience of the other themes.)
- List notable artists who made their homes (full or part time) in the Upper Housatonic Valley who had significant impact on American art and culture, such as Herman Melville, Edith Wharton, Nathaniel Hawthorne, and Norman Rockwell. Describe why they were drawn to the area. (Connection between thematically linked sites.)
- Describe how artists in the Upper Housatonic Valley had impacts on the American imagination and influenced American literature, painting, fashion, and folk art and the economy and financed homes, businesses, and public buildings, and influenced the local architecture and landscape. (Interdisciplinary interpretation.)

- How did paved roads, railroads, and the condition of late 19th century cities affect the development of the arts in the Upper Housatonic Valley? How did the arts affect landscape, land ownership, population, and economy? (Interdisciplinary interpretation.)

**8.3 Engage youth** in understanding the region and interesting them in stewardship. Since today's youth are tomorrow's caretakers, it is essential to the future of our region's heritage that youth learn to appreciate and support the regional resources. The teacher participants in the Upper Housatonic Valley Experience consistently report that their students (and typically the teachers themselves) have never attended many of the natural and cultural resources in their own vicinity.

Programming ideas related the interpretive themes identified in the Management Plan (Appendix 3 – Connections to the Land and Cradle of Industry) that that may be of particular interest to the target age group include:

- Explain how the Housatonic became polluted. Describe and illustrate the effect of polluted rivers and industrial waste on a population.

(Material is understandable to this age group, and lends itself to hands-on exploration.)

- Enumerate species that thrive in Valley ecosystems. Explain why this is significant. (Material is understandable to this age group and lends itself to hands-on exploration.)
- Explain Native American technologies for food growing, processing, storage as well as tool, utensil, and building construction. (Material is understandable to this age group and lends itself to hands-on exploration.)
- Explain how charcoal is produced and how its effects on the land. (Material is understandable to this age group and lends itself to hands-on exploration.)

**8.4 Connect sites, resources, and themes by embracing digital media.** Modernize communication via digital and social media for publicity and education. Use these methods to link sites and regional themes so that Housatonic Heritage can truly be “a catalyst for sharing our heritage,” which is the main objective as expressed in the Management Plan.

Programming ideas related the interpretive themes identified in the Management Plan (Appendix 3 – Connections to the Land *and* Cradle of Industry) that that may most benefit from being connected via digital media may include:

- Track the water power system from mill ponds to river dams to storage reservoirs and locate what remains today. (Interactive digital map, utilizing FLASH technology)
- List the authentic natural and built environments of the Upper Housatonic Valley and describe the ways that those landscapes are maintained. (Interactive digital map, utilizing FLASH technology.)
- Explain how the land is different today than in 1700. (Animated virtual tour that provides visualization of lands then and now.)
- Describe the negative impact of transportation

routes such as the Western Railroad in the 1830s and the Jacob’s Ladder Trail in 1910 on the natural environment. (Interactive website.)

## 9.0 Alignment with NPS “Call to Action”

These goals for interpretation reflect the guiding principles and interpretive trends described in the report of the NPS initiative “Call to Action: Preparing for a Second Century of Stewardship and Engagement.” With innovative communication and education strategies, the NPS seeks to engage diverse communities as it strengthens partnerships that enhance the larger role of the parks and heritage areas as places of learning American values, civic engagement, and stewardship. These same principles will continue to shape Housatonic Heritage’s future. Specifically, the Housatonic Heritage Interpretive Plan is aligned with the following Call to Action goals:

**#3 History Lesson:** Exciting and involving new audiences with a range of interpretive methods is the key to this NPS goal, and its emphasis on including everyone underpins the Housatonic Heritage Interpretive Plan and goal number 1.

**#5 Parks for People:** Improving “close to home” recreation and natural resource enjoyment is consistent with Housatonic Heritage’s first goal which describes the expansion of the audience for recreation, heritage, and cultural opportunities within the heritage area.

**#13 Stop Talking and Listen:** The recommendation for park and heritage area personnel to learn about the opportunities to connect diverse populations to historic and natural resources by listening to those constituents is an integral part of the Interpretive Plan’s goal number 1.

**#16 Live and Learn:** This goal to introduce children to the nation’s historical and natural heritage parallels the Housatonic Heritage goal number 2 of Engaging Youth in programming and stewardship.

**#17 Go Digital:** Like the NPS, Housatonic Heritage plans through its goal number 3 to reach new audiences through digital media by providing current

visitor information in an interactive format that is friendly and flexible for both online and mobile use.

The matrix “Approaches and Trends in the NPS” is included with the Interpretive Plan. This plan also embraces these trends as an approach to NHA wide interpretation. They are included as guiding principles to our member communities and partners.

### **10.1 First Priority Actions to Achieve Stated Goals**

Below is the implementation strategy for achieving the three Housatonic Heritage interpretive goals within the framework of the four interpretive themes identified for the region. The plan is for Housatonic Heritage to continue its key role as the leader that brings stakeholders to the table, coordinates efforts and funding, disseminates information, and partners with its member organizations.

The strategy is to spend the first five years improving the website, gathering baseline audience data, and engaging local youth. In the subsequent years, armed with real data and real experiences, Housatonic Heritage will focus on other new local audiences.

#### **I. Increase and Broaden the Region's Audience.**

##### **10.2 Improve the Housatonic Heritage website.**

There was unanimous agreement from stakeholders and trustees that improving the website was the number one priority. The goal is to ensure that it is the “go-to” place for information about heritage activities, sites and events throughout the region. It will link to all properties and resources, ensuring that the website is a place to learn more about the “real thing” as opposed to “Berkshires hype.” The content on the site will be targeted to residents as well as visitors, but may also be relevant to a national and international audience researching the region's heritage, with no intention or opportunity to visit. Some of the site may be developed by teens as they engage work with sites; in any case, the website should be “youth relevant.” A challenge will be to identify Housatonic Heritage partners as individual sites as well as part of the region. In addition, Housatonic Heritage will offer technical assistance and support to act as a catalyst by bringing heritage

sites together to make the region's websites more attractive, interactive, and interconnected and by encouraging partners to share information and links with each other so that the story of particular sites can be seen in the context of the entire region. *Begin fall 2014.*

**10.3 Participate in MESH (a proposed social media hybrid website about Berkshire events aimed at 18-35-year olds)** based on the capabilities of the Housatonic Heritage redesigned website. *Begin summer 2016*

**10.4 Develop an understanding of current audiences** through baseline data on current audiences and attendance at events. This requires helping to revitalize the dormant Berkshire Audience Initiative sponsored by 1Berkshire. *Begin fall 2014.*

**10.5 Develop open house weekends** to coincide with fall heritage walk weekends. Encourage partners to offer some heritage walks especially for families with young children and advertise. A good model is the Connecticut Open House Day of art, history and tourist sites, which is Saturday, June 14 in 2014. Held before the tourist season begins, the mostly free programs target residents. The program is now in its tenth year. *Begin late spring 2015.*

#### **II. Engage Youth**

**10.6 Establish a Youth Advisory Council** to guide the Board of Trustees with insights into the issues and topics relevant to this age group which was deemed a highest priority for two reasons. First, Housatonic Heritage now engages adults, almost exclusively. Secondly, it is good practice to ask the audience what they want and not to guess at their needs. How this advisory group is to be assembled will require some preparation: it may be by invitation to specific clubs, for community service credit, or an opportunity for existing volunteers. Alternatively, it may be an “open call.” *Begin planning spring 2015.*

**10.7 Evaluate two existing programs that involve schools:** the week-long Upper Housatonic Valley Experience (UHVE) for teachers and the writer-in-residence program. While the UHVE is the most



expensive program to sponsor, there has been no substantive evaluation to assess its impact since its inception in 2003. Presently, teachers are so enmeshed in curricular mandates that they cannot access the new resources they have learned about. The writer-in-residence program, which linked a writer at the Melville home with a local high school, is an excellent and flexible model that could be used with artists or playwrights. First, however, it requires an evaluation and more input from educators regarding how to shape the most effective program possible. *Begin fall 2014.*

**10.8 Host an Education Summit** with heritage partners, K-12 schools, family/youth advocacy groups, Greenagers (teenaged volunteers for the environment), the Massachusetts College of Liberal Arts, Berkshire Community College, and the University of Connecticut to discuss how to work together. Over the past decade, school participation at sites has declined while family and online interest has increased. The core questions will be: are heritage school programs (ranging from class visits and writers in residence to interactive field trips and rich web materials) desirable and viable in 2015 and, if so, how should Housatonic Heritage and partners collaborate to make them happen? What role will families and youth (outside the classroom) play? This “summit” may take the format of a large day-long meeting or it may be a series of more intimate “education roundtables” of ten participants each, modeled after the successful interpretive roundtables hosted to prepare this report. *Begin fall 2015.*

**10.9 Offer a grant round for youth programming** in order to encourage heritage sites to invest in a youth focus. The grant guidelines will be written broadly so that partners may interpret and develop as they see fit, including the expansion, reinstatement and redevelopment of past and current programming specifically targeted to a youth audience. A heritage youth summit may inform both our partner organizations and our grant program as to how best to attract and engage this age group. *spring 2016.*

### **III. Connect Sites, Resources and Themes**

**10.10 Create an online interactive digital map/app of the region** that contains hike/bike/walking/ADA compliant trails and perhaps other heritage resources. It will promote universal access for disabled individuals and will have a downloadable/podcast and web-based version (available via WIFI) to accommodate visitors in areas with no cell coverage. The map will be accessible via computers, tablets, and smart phones, and it will be integrated into the new website. The first step is to determine whether it should be only walking trails or whether it should also include thematic trails like Iron Heritage trail as well as heritage sites. *Begin fall 2015.*

**10.11 Evaluate these two successful models for dissemination:** the smart phone self-guided tours of Great Barrington and the interpretive signage at Beckley Furnace with QR codes. Determine if these 2013 pilots ought to be expanded. *Summer 2015.*

**10.12 Continue the Barn Census Project** which is now waiting funding. Using a Vermont barn census project as a model, researchers will identify GPS coordinates for barns so that visitors can find and learn about the structures and their need for preservation. This “research to interpretation” model will spawn a region-wide interpretation project that will, if successful, inform a program of stewardship and preservation. The barn inventory will be published digitally and in print. *Ongoing.*

**10.13 Gauge the appetite for a common system or an inter-related system of digital access** to collections and archives. Convene heritage partners to discuss collections software, inter-connectivity issues/ease of use, and discuss the potential upside (and potential downsides) for creating an integrated regional approach to aggregating, publishing, linking, and sharing digital collections. This is particularly important for the very small institutions. If an outcome is to collaborate, select best overall collections software (based on criteria established at these joint meetings), then proceed with Housatonic

Heritage funding software, providing a collections specialist “rider” position. The point is to have the conversation about integration and collaboration or linking at a time when organizations are making decisions in this regard. *Spring 2015.*

### **11.1 Staffing**

The Action items represent all new work and will be added to ongoing programs. Since Housatonic Heritage staffing is likely to remain at two part-time staff, with the addition of contractors, until Spring 2015 when the newly accepted Management Plan releases additional funds. At that time, Housatonic Heritage and its Board of Trustees will determine how to acquire skill sets in interpretation, youth leadership, and digital media. These skills may come through contracting or a shared position with a community college or other partner in which students can learn while they are producing.

### **12.1 Budget**

The projects identified in the Interpretive Plan add minimal capital expense. Much of the work will be organized and executed by staff and partners, but some will require the specific assistance of contractors with designated expertise. The digital component provides the opportunity to seek new sources of funding and different support models. At the outset, instead of tapping familiar grant-funding sources, Housatonic Heritage will seek partnerships with local colleges where students can earn credit for digitizing content and for creating within the digital medium. Other ideas are to explore corporate underwriting and an earned income model.

### **13.1 Evaluation and Conclusion**

The Interpretive Plan will be evaluated and updated annually to ensure that the acquisition of new audiences, well-served, remains the target goal of Housatonic Heritage. In the big picture, the Board of Trustees and Council of Overseers will look at numbers and attendance at programs and websites to assess the Plan’s effectiveness.

It is essential to find the best method for determining the success of these new projects. While there are a number of analytical tools to quantify visitors’

page views, time spent on websites, numbers of student visitors and interns, volume of rich media created, minutes of videos put on websites, numbers of virtual tours--it is important to choose carefully which metrics provide useful data and to decide what constitutes success. In addition, Housatonic Heritage and its partners need to consider how to measure a shift in demographics over time and to measure an increase in visitation. It is clear that evaluation and audience surveying must be ongoing and a regular part of the work of Housatonic Heritage and its partners. *Begin fall 2014.*

### **14.1 Second Priority Action Items**

So many good ideas were generated at the January 2014 interpretive roundtables that Housatonic Heritage does not want to lose sight of the ones that didn’t make the top priority list. These second tier projects are listed here because they may be recalled or substituted as need, time, and money require.

#### ***I. Increase and Broaden the Region’s Audience***

by serving as a catalyst for audience-building initiatives:

**14.2** Hold a competition to redesign the Housatonic Heritage website. Ensure that it includes short videos which are standard fare on websites and Facebook these days. Ask youth to make a short video describing what individual sites mean to them and then provide the weblink.

**14.3** Because visitors want to share experiences instantly, such as sending a photo to a friend, create programming to enhance and harness that experience. Create a Housatonic Heritage Pinterest (or similar photo sharing platform) of the region.

**14.4** To develop new audiences, first engage with the new audiences (the estimate is that 90% of Housatonic Heritage audiences are white). There is no substitute for talking new potential audiences and not presuming their desires and needs. Examine models for community engagement programs and convene experts in a workshop about working with new multicultural audiences, including international visitors. A regional organization called “Multicultural Bridge” does training.

**14.5** Consider Spanish and other language translations for interpretive materials, including print and digital.

**14.6** Because sites are far-flung and tucked away outside of town centers, develop some light-hearted publicity in the towns, like a pop-up kiosk where visitors can take a fun quiz along the “guess where I am” theme.

**14.7** Convene organizations to discuss how they can expand their missions and audiences by manifesting a public educational, informational or inspirational presence on the roadside or in unexpected outdoor places to capture an “accidental” audience. These public displays should be conceived as ways to break the boundaries between the interpretation of history, science, and art.

**14.8** Make a ‘Brew Trail’ of local heirloom brewers for adult audiences as a means of bridging this audience to other interpretive programming.

**14.9** With regional partners, discuss the efficacy and desirability of regional signage and make a recommendation about whether a plan should be developed.

## **II. Engage Youth**

**14.10** Add more age-appropriate marketing for youth. Show them in authentic experiences with the tag line “Get your hands dirty.”

**14.11** Celebrate youth by having a teenager engaged at a site and ask a friend to film their experience, along the lines of “show what you love about the Upper Housatonic Valley in 3 minutes.” Post on the Housatonic Heritage website.

**14.12** Create the place where students can meet their high school’s community service requirements. Bidwell House offers a two-week internship for a \$200 stipend. At the end of a few days, interns are able to give tours. Bartholomew’s Cobble has students conduct tours because they, too, learn material at the lightning speed and retain it. Housatonic Heritage could host a portal for internship and mentorship opportunities for youth.

**14.13** Housatonic Heritage could serve as a clearinghouse for interns placed by colleges where the tuition/stipend is paid by the college. Housatonic Valley Association had a successful arrangement with Columbia University where student tuition paid stipends.

**14.14** Host a program of moonlit night walks or hikes for young adults in their 20s.

**14.15** Give free tickets to sites and events to families of high school graduates whose schools use Tanglewood for graduation exercises.

**14.16** Get young people out on the river because it is the actual experience of being on the water or out in nature that leaves the impression. Challenge school systems to give every student an “on the water” experience before they graduate.

**14.17** Hold training for Housatonic Heritage partners about the Common Core standards. Use Hope Sullivan, IS23 arts school, as an advisor to inform and assess proposed future educational programming initiatives.

**14.18** Recognize that school is only one facet of young peoples’ lives. Create a forum around the topic of attracting youth with at-risk youth leaders, youth advocacy organizations, clubs, church groups, scouts, etc. Chesterwood has had experience with AmeriCorps volunteers.

**14.19** Analyze the success of existing stewardship programs as potential models for youth involvement. Expand Greenagers program or model to Art-agers or Histagers, or even Heritagers. Perhaps Greenagers could pick different sites and cross over from environmental work to history work. Use Berkshire Community College as a showcase for students’ work.

## **III. Connect Sites, Resources, and Themes**

**14.20** Create an informative pop-up “heritage mobile” (van or similar motor vehicle) that can be driven to events to distribute information on regional heritage events. Visitors can try to stump the driver with trivia questions.

**14.21** Produce brochures that describe “what’s nearby,” e.g. list the hiking trails close to Bidwell House museum. In general, sites could promote what is near them.

**14.22** Support sites with their digital media program by providing staff support where there is no dedicated staff. There is a need for Housatonic Heritage to help the sites stay current and to be continually evaluating and adapting to new technologies.

**14.23** Create a video game about the region with assistance from an RPI professor who lives in the region.

**14.24** Sites want to talk more about the connections of the river or the inspirational landscape to the arts. For example, Daniel Chester French moved a barn so he would have a view of Monument Mountain, and he sculpted the landscape by creating walks and garden rooms on his property. Themes like the power of nature, the nature of power (water power), and the power of place have yet to be woven among the interpretations at the region’s sites. Housatonic Heritage could consider an art in nature trail that explores inspirational sites and themes. Other unifying themes might be Transcendentalism or industry within the landscape in which industrialists created a miles-long river/land system of reservoirs, factories and mill ponds that all affected each other.

**14.25** Enable geocaching of the entire heritage area that leads people from story to story. Consider a heritage reward for achieving a number of caches. Engage at the level of finding the geocache but then add heritage connection.

**14.26** “Get heritaged” became the slogan of sneaking in heritage information by engaging people for one reason and adding heritage into the experience.

**14.27** Create a “Lending Library of Interpretation.” Exchange expert interpreters from site to site so that, for example, an environmentalist explores

the land around the large estates and art experts talk about the historic houses. One successful example of interdisciplinary interpretation occurred when a Housatonic Valley Association representative gave a program at Chesterwood. Birding could occur at Chesterwood.

**14.28** Provide heritage sites with information about the relevance, importance, and process of making websites compatible for mobile phones to increase visitation. Provide incentives and tools to help heritage sites develop mobile compatible versions of their websites.

**14.29** Hold a seminar to demonstrate the potential of “Google Analytics,” a free service offered by Google to enable sites to learn how people are using their websites. Participants will learn how to analyze website visitor information, content, interest and engagement, paying particular attention to the treatment of graphics and the gathering of new audiences. Follow-up to disseminate what was learned.

**14.30** Housatonic Heritage could produce a glossy annual magazine for non-digital readers with real articles about what children and youth are doing. Ask established writers living in the Berkshires to contribute articles and sell advertising. Alternatively, make it look like a newspaper so it appears like it is the latest version. Possibly contracting with or collaborating with *Orion* magazine.



# Approaches and Trends in the NPS

Effective operations are shifting to these approaches to work.

Current Approach	Why — What We Gain	Old Approach
<b>Audience-Centered</b>	<ul style="list-style-type: none"> <li>Two-way communication. Shifts from “for audiences” to “with audiences”, flexible.</li> <li>Focus is on experiences and engagement. There are multiple ways to access content.</li> <li>Audience expertise (learning theory, motivation) is highly valued by organization.</li> <li>Shift from content-driven to combination of audience- and content-driven, content is co-created among diverse voices. Requires being comfortable with letting go.</li> </ul>	<ul style="list-style-type: none"> <li>One-way information from institution to audience; static.</li> <li>Focus tends to be on interpreter rather than on audience.</li> <li>Deep subject matter expertise is highly valued by organization.</li> <li>The organization controls content development.</li> </ul>
<b>Collaborate</b> (Work with and through others)	<ul style="list-style-type: none"> <li>Consistently works across disciplines and organizations.</li> <li>Leverages fiscal and human resources. Partner niche/networks used to advantage.</li> <li>Mutually beneficial relationships among partners (<i>with</i> them). Requires shared control.</li> </ul>	<ul style="list-style-type: none"> <li>Employee, division, or park tends to work independently.</li> <li>Content developed primarily within the division or park.</li> <li>Partnership tended to be for funding NPS goals.</li> </ul>
<b>Make Connections</b> (...between places, stories, organizations, etc.)	<ul style="list-style-type: none"> <li>Makes topic (“thematic”) connections across organizational and geographic boundaries.</li> <li>Connects ideas, issues, places, and events to other sites or other geographical regions.</li> <li>Provides context; explores cause and effects.</li> </ul>	<ul style="list-style-type: none"> <li>Primary focus is limited to the site or the site story, without connections to larger stories, systems, issues, or places.</li> <li>Acts independently rather than seeks others with expertise.</li> </ul>
<b>Connect to Communities</b> (Engage audiences)	<ul style="list-style-type: none"> <li>Attracts local people—e specially children and families—as well as destination visitors.</li> <li>Welcomes and meets people—intellectually and physically—where they are, not where we think they ought to be.</li> <li>NPS functions in the community and is part of it—rather than “reaching out” to it.</li> </ul>	<ul style="list-style-type: none"> <li>Programming appeals mainly to destination visitors who share employees’ values.</li> <li>Seeks to transfer the organization’s values.</li> <li>NPS “reaches out” to communities.</li> </ul>
<b>Free-Choice Learning</b> (Self-directed and informal learning)	<ul style="list-style-type: none"> <li>Emphasis is on visitor experiences (rather than formal programming).</li> <li>Learning is flexible, informal, free choice learning and directed by audiences.</li> <li>Junior Ranger facilitates family interaction and informal learning via site exploration.</li> </ul>	<ul style="list-style-type: none"> <li>Emphasis on formal, static programming.</li> <li>Purpose is to enhance audience knowledge.</li> <li>Primary goal of Junior Ranger is to teach children about a site.</li> </ul>
<b>Media and Technology are Integrated Tools</b> (They are not add-ons)	<ul style="list-style-type: none"> <li>Media and technology are fully integrated into visitor experience and operations.</li> <li>Online experiences may be the only interactions with a park.</li> <li>Carefully matches media to message and audience. Does not start with media choice.</li> <li>Limited time, resources, and more options requires strategy, choices, and capacity.</li> <li>Requires rethinking distribution of resources; implications for position management.</li> <li>Requires employees to have new/different skills and tools.</li> </ul>	<ul style="list-style-type: none"> <li>Media and technology are treated as add-ons to existing operations, services and programming. Park experiences mostly limited to tangible objects on-site.</li> <li>Technology is viewed as an end rather than as a means.</li> <li>Media and technology duties are collateral assignments, scheduled as time permits.</li> </ul>
<b>Data and Analysis Drive Decisions</b>	<ul style="list-style-type: none"> <li>Decisions are based on application of data and analysis. Applies relevant, objective outside data (e.g. Pew Trusts demographic research) as well as project-specific data.</li> <li>Aligns efforts; applies strategic thinking toward goals. New practices are not added on top of what exists; some practices are adapted and others are dropped.</li> </ul>	<ul style="list-style-type: none"> <li>Decisions are based on assumptions, our own preferences for programming, or continue “what we’ve always done”.</li> <li>Decisions are reactive; based on emotion or personalities.</li> <li>Evaluation is done, but results are not applied to decisions.</li> </ul>

**Be Part of the Solution** — to help move the NPS from where we are to where we need to be:

- **Develop External Awareness** — External awareness is a critical skill. Become aware of the larger forces at work in society and our organization.
- **Shed Old Ways** — We honor the past but are not bound by it. Shed systems and products that no longer work for our audiences or need to be adapted to accomplish the mission today. This may require some grieving for old ways but is part of the process to make the NPS stronger and more relevant.
- **Be Strategic** — Don’t try to do everything. Make strategic choices. Work from each organization’s niche and employees’ strengths. Parks and programs will not be rewarded for doing everything; they will be rewarded for choosing carefully and matching goals with sustainable choices.
- **Experiment** — Take risks. Experiment for short periods of time. Review analysis and data. Make informed decisions about how to move on from there.



**The Commonwealth of Massachusetts**  
**MASSACHUSETTS SENATE**

**SENATOR BENJAMIN B. DOWNING**  
*Berkshire, Hampshire, Franklin and Hampden District*

*Chairman, JOINT COMMITTEE ON  
TELECOMMUNICATIONS, UTILITIES AND ENERGY*

*Chairman, SENATE COMMITTEE ON  
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June 7, 2013

Secretary Sally Jewell  
U.S. Department of the Interior  
1849 C Street, N.W.  
Washington D.C. 20240

***Re: Management Plan of the Upper Housatonic Valley National Heritage Area***

Dear Secretary Jewell:

I am writing in support of the draft Management Plan of the Upper Housatonic Valley National Heritage Area. I am familiar with the development of the Heritage Area, and the preservation and conservation work that has been ongoing there. The Heritage Area is a crucial component of the thriving tourism industry in my district, which brings thousands of people from around the world each year to enjoy its rich cultural offerings. Thus, I have long been an advocate of the Heritage Area and I believe that the current draft Management Plan adequately addresses the requirements as outlined in Section 276 of the enabling legislation (P.L. 109-338).

The policies, strategies and recommendations for conservation, funding, management and development of the Heritage Area are outlined within the aforementioned Plan. It is my strong belief that, if implemented, this Plan would adequately protect the heritage resources of the region. The Plan has been developed in consultation with numerous agencies, organizations and individuals, and reflects the region's highest priorities for resource conservation.

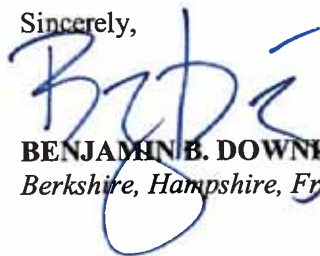
The Housatonic Heritage Management Plan includes implementation strategies in cooperation with a broad array of State and local governmental entities, natural and historic resource protection organizations, educational institutions, businesses, and recreational organizations. These cooperative programs and implementation strategies, both ongoing and proposed, are outlined in detail within the plan. I believe these strong bonds of cooperation and coordination are a sound approach to conserving the region's precious resources.

Governance of the Upper Housatonic Valley National Heritage Area is representative of the diverse interests of the region. Broad representation on the Board of Trustees and the Council

of Overseers is a cornerstone of remaining inclusive and reflective of the region's priorities with respect to resource conservation.

I firmly support the Management Plan and thank you for your consideration of this proposal. I hope that you will grant it a favorable and swift report. Please contact my office if you require further information regarding this important matter.

Sincerely,



**BENJAMIN B. DOWNING**, *State Senator*  
*Berkshire, Hampshire, Franklin & Hampden District*

BBD/tf



SMITTY PIGNATELLI  
REPRESENTATIVE  
1<sup>ST</sup> BERKSHIRE DISTRICT  
P.O. BOX 2228  
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June 7, 2013

U.S. Department of the Interior  
Attention: Secretary Sally Jewell  
1849 C Street, N.W.  
Washington DC 20240

Dear Secretary Jewell,

I write today to express my support for the draft Management Plan of the Upper Housatonic Valley National Heritage Area (Housatonic Heritage). The plan has been developed and submitted in compliance with Section 276 of its enabling legislation (P.L. 109-338).

Housatonic Heritage has been working to conserve, preserve and illuminate the heritage of the region for more than 10 years. Their ongoing work includes the African American Heritage Trail, the Upper Housatonic Valley Experience teachers' course, well-attended annual Heritage Walks, Paper Heritage and Iron Heritage Trails. Working with numerous partners, these programs have served the region well through research projects, events, publications and interpretive materials.

Our National Heritage Area continues to work closely with many of the region's institutions, organizations and individuals to provide educational programs, enlightening public events, and direct grants to further develop the capacity of our conservation / preservation organizations. Housatonic Heritage works cooperatively with such regional partners as the Berkshire Regional Planning Commission, Berkshire Natural Resources Council, Berkshire Visitors Bureau, Housatonic Valley Association, educational institutions, municipalities and non-profit organizations – all in the pursuit of conserving our heritage resources.

I believe that the draft Management Plan describes implementation policies and strategies that are essential for long-term resource conservation, and that those policies and strategies have been collaboratively agreed upon by our most important regional institutions. I respectfully ask for your approval of this document, and the strategies and policies described therein.

Sincerely

A handwritten signature in cursive script that reads "Smitty".

SMITTY PIGNATELLI  
State Representative  
Fourth Berkshire District