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# OCTAGON HOUSE FOUNDATION, INC. EXECUTIVE FEASIBILITY STUDY

**September 2025  
Full Report**

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## Virginia Tech Partners

### Center for Economic and Community Engagement (CECE)

The Center (formerly known as the Office of Economic Development) connects Virginia Tech faculty, companies, and communities in ways that help create, retain, and enhance the availability and quality of jobs and opportunities around the Commonwealth. This includes providing applied research, technical assistance, and training services to increase clients' abilities to prudently manage economic change and build capacity to stimulate change. CECE faculty possess project-relevant research experience and expertise in case study methodology and mixed methods analysis. CECE has a long history of strategic planning for economic and workforce development, working on talent pipeline and development projects with state, regional, and local organizations. As a designated US Economic Development Administration University Center, CECE serves a distinct role of subject matter expertise and community outreach. The Center provides capacity-building services across the state.

<https://cece.vt.edu/>

### Institute for Policy and Governance (IPG)

The Virginia Tech Institute for Policy and Governance collaborates with communities and public organizations to promote equity, effective governance, and social change through research, evaluation, training, and capacity building. Founded in 2006, IPG has supported partners at multiple geographic scales (local, regional, state, and international) and in a variety of domains including public health, workforce development, human services, housing, public management and nonprofit governance. Faculty at IPG have expertise in community development and engagement methods, social change and mixed methods research, program development, management and evaluation, public sector continuing and professional education, strategic visioning, and economic feasibility studies. <https://ipg.vt.edu/>

### Virginia Tech Southwest Center

The Virginia Tech Southwest Center is one of five Virginia Tech Commonwealth Campus Centers located throughout Virginia, with other locations including Richmond, Hampton Roads, Roanoke and Critz. The Virginia Tech Southwest Center advances the university's land-grant mission by connecting the region to Blacksburg-based researchers and educational experts from across the globe, creating mutually beneficial community partnerships, offering professional development programs, and building collaborations to enrich discovery and learning by working alongside communities in Southwest Virginia.

<https://swvac.vt.edu/>

## List of Acronyms

**ADA** - Americans with Disabilities Act  
**ARC** - Appalachian Regional Commission  
**AREC** - Agricultural Research and Extension Center  
**CALS** - College of Agriculture and Life Sciences  
**CCC** - Civilian Conservation Corps  
**CDAC** - Community Design Assistance Center  
**CECE** - Center for Economic and Community Engagement  
**CNE** - Center for Nonprofit Excellence  
**COA** - College for Older Adults  
**DAR** - Daughters of the American Revolution  
**DHR** - Virginia Department of Historic Resources  
**DMO** - Destination Marketing Organization  
**DNCR** - North Carolina Department of Natural and Cultural Resources  
**EC** - Employee Compensation  
**FY** - Fiscal Year  
**G2G** - Grants to Grow  
**GDP** - Gross Domestic Product  
**HHC** - Historic Hillsborough Commission  
**HSR** - Historic Structure Report  
**IDEAL** - Inclusivity, Diversity, Equity, Access, and Leadership  
**IPG** - Institute for Policy and Governance  
**LEAF** - Link Education About Forests  
**LOI** - Letter of Intent  
**MMLP** - Microbusiness Marketing Leverage Program  
**NOFO** - Notice of Funding Opportunity  
**NPPN** - National Preservation Partners Network  
**NRHP** - National Register of Historic Places  
**NTPF** - National Trust Preservation Funds  
**OPI** - Other Property Income  
**PI** - Proprietor Income  
**POI** - Point of Interest  
**RFP** - Request for Proposal  
**SCCF** - Smyth County Charitable Fund/ Community Foundation  
**SHPO** - State Historic Preservation Office  
**SOL** - Standards of Learning  
**STEM** - Science, Technology, Engineering, Math  
**SVAREC** - Shenandoah Valley Agricultural Research and Extension Center  
**SWOT** - Strengths, Weaknesses, Opportunities, and Threats  
**TOA** - Town of Abingdon  
**TOPI** - Taxes on Production and Imports net of subsidies  
**USC** - United States Code  
**VDOT** - Virginia Department of Transportation  
**VFGC** - Virginia Forage and Grassland Council  
**VLCF** - Virginia Land Conservation Foundation  
**VMHC** - Virginia Museum of History & Culture  
**VTC** - Virginia Tourism Corporation

## Introduction to the Study

The Octagon House Foundation contracted with Virginia Tech from June 1 – September 30, 2025, to conduct an executive feasibility study including a market scan, a SWOT analysis based on key findings from stakeholder and case study interviews, a projection of the economic impact of visitation using IMPLAN, and recommendations. A key goal of the study is to position the Octagon House Foundation to apply for targeted grant opportunities to complete restoration of the house, finance program development, and achieve multiple proposed phases of development to include an event venue, visitors' center, lodging and dining services.

## Precedent Reports

To inform this study, the Virginia Tech team reviewed several internal documents of the Octagon House Foundation, including the 2024 business plan, proposed lesson plans and educational tours, operational spending documents, estimates for initial construction repairs, and the 2025 strategic plan, as well as the following reports outlining conceptual designs for the site conducted by the Community Design Assistance Center (CDAC) at Virginia Tech.

*Marion, VA: Abijah Thomas House Conceptual Site Master Plan*

<https://vtechworks.lib.vt.edu/items/d9137e4b-09eb-49c3-a6a4-1fd68f43605f>

*Marion, VA: Octagon House Barn Complex Conceptual Design*

<https://vtechworks.lib.vt.edu/items/1e6f1cf4-95c7-4088-9cbc-c247360db47e>

## About the Octagon House

The Octagon House in Smyth County, built in 1856-1857, has been praised as one of the most intact octagonal houses still standing in Virginia. This 17-room brick octagonal structure was added to the National Register of Historic Places (NRHP) in 1980 and helps to tell the story of Abijah Thomas (1814-1875), a leading industrialist in Smyth County before the Civil War, who acquired thousands of acres for his homestead, iron furnaces and foundries, and woolen mills. The house was built by enslaved African-American laborers, some of them children, who handcrafted the bricks and left behind fingerprints in the clay. The eight corners of the house required a unique brick design to accommodate the unusual angles. According to the National Register nomination application,

Commanding a panoramic view of the South Fork country of the Holston River in Smyth County, the Abijah Thomas House is a rare expression in Virginia of the concept of octagonal domestic architecture that caught the imagination of Americans in the great reform ferment of the 1850s. The originator of the concept, Orson S. Fowler (who constructed his own octagonal house near Fishkill, Dutchess County, New York, in 1853), introduced readers to the functional, stylistic, and humanitarian advantages of an eight-sided dwelling through successive editions of his book, *A Home for All*, first published in 1843. Of more than a thousand buildings which were constructed in the United States emulating Fowler's ideas, the Thomas House is Virginia's most sophisticated example. Built in 1856-57 by Smyth County's foremost antebellum industrialist, Abijah Thomas, the distinctive brick structure retains a notable variety of grained and marbled baseboards, as well as a rare marbled plaster wall. With its unusual design, once-beautiful interior decoration, and mountain view, the residence is symbolic of the rise to prominence of a pioneer family of southwestern Virginia in the years just prior to the Civil War.

Despite his prosperous industrial activity and acquisition of thousands of acres over time, Abijah Thomas was plagued by credit debt throughout his life<sup>1</sup> and went bankrupt during the Civil War, in part because he converted many of his holdings into Confederate notes. Union forces also destroyed his iron works at Staley's Creek and his woolen mills closed due to lack of business. Following the war, much of his land was pledged as collateral for cash advances and the family faced court litigation that was not settled until 1903. During the 20<sup>th</sup> century, the house was used for apple and farm equipment storage, and as a tobacco barn, and fell into disrepair over time. The house was listed as one of Virginia's most endangered places in 2015, emphasizing the urgency to preserve this unique architectural monument.

### Vision for the Octagon House Cultural and Historical Preservation Center

The Octagon House was purchased by Derek Orr in 2003 and donated to the Octagon House Foundation, Inc. when it was formed as a nonprofit in 2014. The Octagon House Foundation is focused on serving the 13 counties and three cities of Southwest Virginia, including Buchanan, Dickenson, Lee, Russell, Scott, Smyth, Tazewell, Washington, Wise, Wythe, Bland, Carroll, and Grayson Counties, along with the cities of Bristol, Galax, and Norton. According to the Foundation's 2024 business plan, the vision for the site is "to safeguard the Octagon House as a timeless symbol of architectural and cultural significance, preserving it for future generations. We aim to transform the property into a vibrant center that celebrates history and serves as a catalyst for education, community events, and job creation. By becoming a hub of activity, the restored Octagon House will drive economic growth, support workforce development, and foster community engagement, establishing itself as a cornerstone of historical preservation and community vitality in Marion and the surrounding region."

The plan for the site includes a complete restoration of the historic house and grounds, in addition to development of a large event venue furnished with lodging, dining, and a visitor's center. These features will be added over several phases of development and fundraising efforts to garner support from members, donors, public and private grants, as well as revenues earned from operations. Programming for the site will include general and specialized tours of the house and grounds, educational workshops, hands-on activities, fieldtrips and summer camps for local youth, wedding and conferences, music and cultural festivals, holiday events, and a variety of event rentals for graduations, baby showers, reunions, etc.

### Limitations to the Study

The capital costs of construction and development to restore the original infrastructure and build new facilities on site have not been factored into the economic impact of this executive feasibility study due to lack of detailed budget data. Because the Octagon House is not yet operational, the economic impact estimate provided in this report is based on hypothetical visitation rates assuming the phases of development are achieved as proposed. Many variables will impact the timeline and completion of the phases of development, including attaining funding, generating sufficient cash flow and revenues to sustain operations, and establishing the site as a regional tourism destination.

The Virginia Tech team interviewed several key stakeholders in the region as well as staff who work at peer case study historic sites that have been reimagined for cultural interpretation. Due to the relatively short timeframe of the study, the list of individuals interviewed is not exhaustive or completely representative of all possible perspectives. Nonetheless, the team endeavored to portray a variety of insights from stakeholders with expertise in multiple areas in order to generate feasible recommendations.

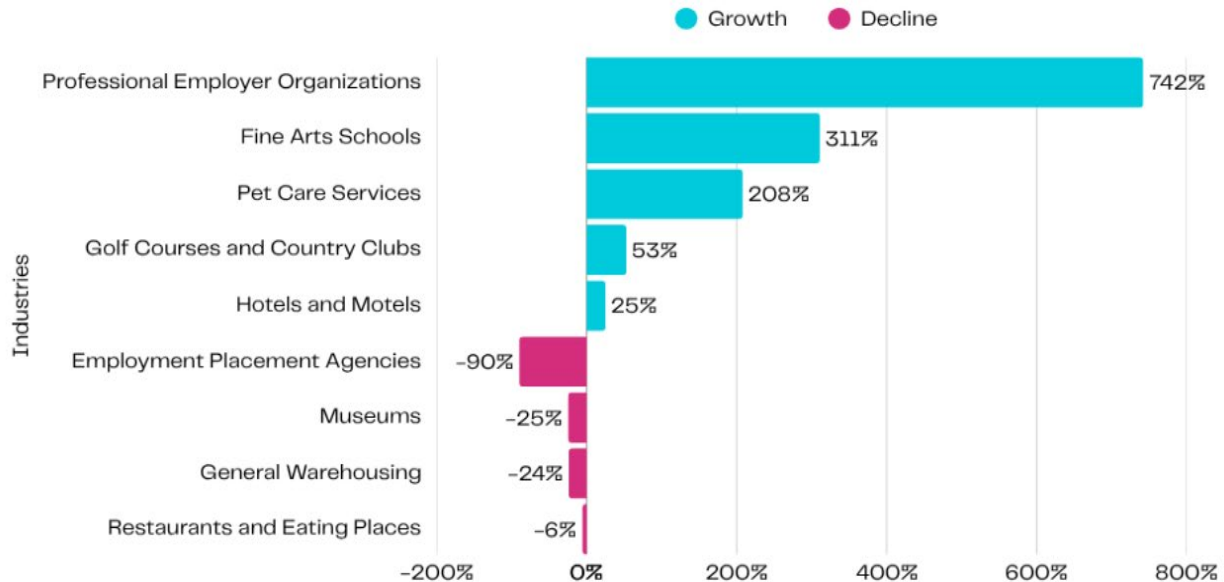
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<sup>1</sup> Sturgill, M. H. (1990). *Abijah Thomas and His Octagonal House*. Tucker Printing: Marion, VA.

## Regional Tourism Overview and Market Analysis

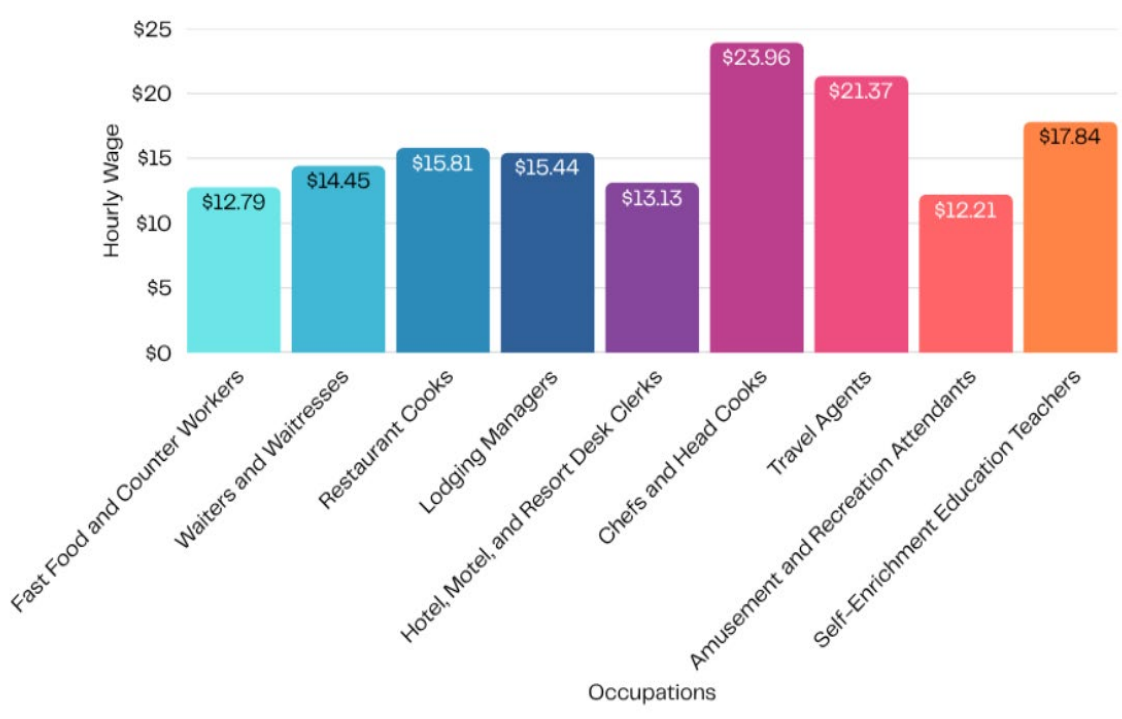
Tourism in the Southwest Virginia region serves as an essential driver of economic development, cultural preservation, and community vitality. From 2015 to 2025, tourism-related industries and occupations have experienced considerable shifts. This section contains an analysis of data sourced from Lightcast Q2 2025, and highlights key growth areas, occupational changes, and the significance of cultural assets in shaping the region's tourism economy.

Over the past decade, several tourism-related industries in Southwest Virginia have expanded, particularly those supporting lifestyle and enrichment tourism. Figure 1 illustrates how Southwest Virginia's tourism economy, including the localities in GO Virginia's Region 1, is shifting toward service flexibility, enrichment experiences, and pet-inclusive travel. While some industries are rapidly expanding, others such as museums and restaurants face workforce and funding challenges that signal deeper structural shifts in how tourism is delivered and consumed. These changes align with broader regional labor patterns, where hospitality businesses increasingly rely on contracted staff and struggle to fill traditional service roles due to rising costs and worker shortages.



**Figure 1. Growth and Decline of Key Industries in Southwest Virginia (2015-2025) (Lightcast Q2, 2025)**

Between 2015 and 2025, Southwest Virginia's tourism industry experienced a dynamic shift in employment patterns, reflecting broader changes in visitor preferences and regional economic conditions. Several specialized roles, including restaurant cooks, travel agents, and self-enrichment education teachers, saw significant growth, highlighting an increasing demand for personalized, educational, and experience-driven tourism services. At the same time, more traditional frontline service positions such as fast-food workers and waitstaff experienced notable declines, due to automation, labor shortages, and changing consumer expectations. Figure 2 illustrates the variation in median hourly wages across key tourism-related occupations in Southwest Virginia, highlighting higher earnings in specialized roles compared to frontline service positions.



**Figure 2. Hourly Wages by Tourism-Related Occupation in Southwest Virginia (current) (Lightcast Q2, 2025)**

Southwest Virginia’s cultural institutions remain vital to the tourism economy despite some workforce declines. These institutions preserve heritage, generate revenue, and attract visitors to rural areas and small towns as they create jobs, support small businesses, and strengthen the region’s identity. Southwest Virginia’s tourism sector is transitioning. While traditional service jobs decline, new opportunities arise in food, recreation, enrichment, and cultural experiences. Industries such as arts education, pet care, and boutique hospitality are growing, and visitors increasingly seek immersive, high-quality offerings.

The regional tourism economy demonstrates strong economic performance indicators, with Southwest Virginia visitor spending reaching \$1.2 billion in 2022, representing a 10% increase over the previous year.<sup>2</sup> Regional tourism supports 11,499 jobs and generates \$59.5 million in taxes, underscoring its significant economic impact. However, the sector faces notable challenges despite spending increases, with tourism employment declining by 8.4% regionally, and regional tourism wages remain \$2.85 below the national median.<sup>3</sup>

The region benefits from strategic location assets including the Interstate 81 corridor with 26,635 average daily traffic and regional access through a 325-mile corridor spanning 13 Virginia counties.<sup>4</sup> An influx of tourism traffic is anticipated due to the opening of the Hard Rock Hotel and Casino Bristol. Additional strategic assets include a network of 30 colleges and universities along I-81, tourism connective infrastructure encompassing the Blue Ridge Parkway, Appalachian Trail, the Creeper Trail,

<sup>2</sup> Virginia Tourism Corporation. (2023). Virginia tourism economic impact data for 2022. *Tourism Economics*.

<sup>3</sup> Lightcast. (2024). Tourism industry. Retrieved July 15, 2025, from <https://lightcast.io>

<sup>4</sup> AASHTO (American Association of State Highway and Transportation Officials). (n.d.). Interstate 81 (VA) case study. *AASHTO Planning Tools*. [https://planningtools.transportation.org/290/view-case-study.html?case\\_id=25](https://planningtools.transportation.org/290/view-case-study.html?case_id=25)

and New River Trail, and numerous cultural, historical, and outdoor experiences and amenities. The region also benefits from an engaged network of outdoor and cultural economy professionals and organizations dedicated to growing the creative economy and connecting assets to one another to create quality experiences for travelers and locals alike.

## Smyth County Tourism Market

Within this regional context, Smyth County presents a more focused market dynamic. Smyth County visitor spending reached \$28.3 million in 2022, showing 3.7% growth,<sup>5</sup> demonstrating continued visitor interest. However, the county faces more pronounced employment challenges, with tourism employment declining by 18.7%, higher than the national average. Additionally, Smyth has a below-average market concentration for tourism at 0.91x the national average, and the county has experienced a population decline from 32,208 in 2010 to 28,963 in 2023.<sup>6</sup>

The county benefits from significant assets, particularly Hungry Mother State Park, which serves as a major draw. A recent demand analysis conducted by the Center for Survey Research identified specific market gaps, with visitors' number one request being more restaurants, and their number two request being more lodging options. Notably, families with young children show the lowest satisfaction scores among visitors, indicating an opportunity for family-focused attractions and amenities. Based on these trends, this market analysis identifies complementary and competing activities in the region and characterizes uses and users of the Octagon House Cultural and Historical Preservation Center.

## Demand Analysis: Visitor Profiles and Patterns

Based on the 2023 Visitor Profiling and Nature of Demand Study for Smyth County,<sup>7</sup> existing visitors to the county have demographics favorable to heritage tourism.

- The market is largely family oriented, with roughly 80% of visitors married or in partnerships.
- 54.5% of visitors have children 18 or younger, which is the target museum-visiting demographic.
- 40.5% of visitors earn more than \$80,000 per year, and 25% earn over \$100,000 per year, indicating that they have discretionary income for heritage experiences.
- The average satisfaction rate among existing visitors is favorable at 4.2/5, which leads to longer stays and more repeat visitation.
- 76% of visitors rate Smyth County “very good” or “excellent” as a destination, and families with children under 10 years of age frequently cite the prevalence of museums as a key pull factor for visiting.

Existing visitation patterns are also a positive indicator of demand for the Octagon House as a tourism destination.<sup>8</sup>

- 50% of visitors visit more than once per year, indicating strong regional and local loyalty.
- 15% visit more than 4 times annually, indicating a strong core supporter base as well.
- 45% of visitors stay longer than 2 nights, which is essential for realizing the economic impacts of visitation.
- 73% of visitors consider Smyth County a standalone destination, showing it has a primary draw capability, and should not be considered a secondary destination to other assets in the region.

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<sup>5</sup> Magnini, V. (2023). Visitor Profiling and Nature of Demand Study for Smyth County, Virginia. Institute for Survey Research, Virginia Beach, VA

<sup>6</sup> Lightcast. (2024). Tourism industry in Smyth County. Retrieved July 15, 2025, from <https://lightcast.io>

<sup>7</sup> Magnini, V. (2023)

<sup>8</sup> Magnini, V. (2023)

- The visitors to Smyth County are somewhat spontaneous, with 47% making visit decisions less than one week in advance. Summer shows the highest spontaneous travel rates.
- Of the experiences offered, visitors rate parks, especially Hungry Mother State Park, as the primary pull factor, with museums and galleries secondary, and key for families. Visitors also rate historic sites and scenic vistas in Smyth County highly.

## Competitive Analysis and Market Positioning

Smyth County has several direct regional competitors. In tourism, however, competitors can turn into “co-opetition” partners when sites refer visitors to one another, and visitors choose Southwest Virginia for the range of destinations and assets they can visit. Those direct regional destination competitors are Bristol, Abingdon, Wytheville, and Roanoke. Outside of Southwest Virginia, secondary competitors include the mountain and cultural destinations in Tennessee and North Carolina. Smyth County also experiences competition with other Virginia counties with state parks that have well-developed infrastructure.

The Octagon House has several compelling competitive advantages. First, the unique octagonal architecture is a rare regional offering. The site’s industrial heritage narrative can be linked to a larger network of tourism sites, especially the history of enslaved people and the ability to view their fingerprints in the bricks of the house. The National Register for Historic Places designation adds credibility and marketing value to the site. Its strategic location on 1-81 means it gets high traffic accessibility, attracting thru-travelers who might not otherwise stop. Finally, the development of the house into an interactive museum has validated visitor demand among the existing market. According to the 2024 Annual Survey of Museum-Goers, the median age of frequent historic site visitors is 65 years of age and is 49 years for casual or sporadic visitors,<sup>9</sup> which aligns well with the older median ages found in southwest Virginia.

The following points of interest (POI) within the region are highlighted to illustrate some of the opportunities to cross-promote the Octagon House with other tourism destinations. The Top-10 Cross Visits data in particular can help to show that visitors often go to multiple destinations during their trip. *Please note that the Virginia Tourism Corporation data dashboards shown here are based on a sample of visitors, not the total number of visitors last year.*

## Downtown Marion

Downtown Marion<sup>10</sup> is the home of the Lincoln Theater and the General Francis Marion Hotel, and hosts a variety of cultural activities, live music events, and festivals throughout the year. The town was established as the county seat of Smyth County in 1832 and is considered the birthplace of the soft drink Mountain Dew. The town of Marion, VA has a population of approximately 6,000 people and is a 15-minute drive from the Octagon House.

According to Figure 3, Marion’s Main Street attracted a majority of local and regional visitors, with Friday being the most popular day for visitors. Its top three cross-visit locations include Abingdon Main Street, Wytheville Main Street, and Hungry Mother State Park.

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<sup>9</sup> Wilkening, S. (2025, February 28). Breaking Down Visitation by Museum Type: A 2024 Annual Survey of Museum-Goers Data Story. *American Alliance of Museums*. <https://www.aam-us.org/2025/02/28/breaking-down-visitation-by-museum-type-a-2024-annual-survey-of-museum-goers-data-story/>

<sup>10</sup> Marion - Downtown Historic District. (2022). *Friends of Southwest Virginia*. <https://visitswva.org/attractions/marion-downtown-historic-district/>

SWVA Blue Ridge Highlands

Marion Main Street (January 1, 2024 to December 31, 2024)

VIRGINIA IS FOR LOVERS

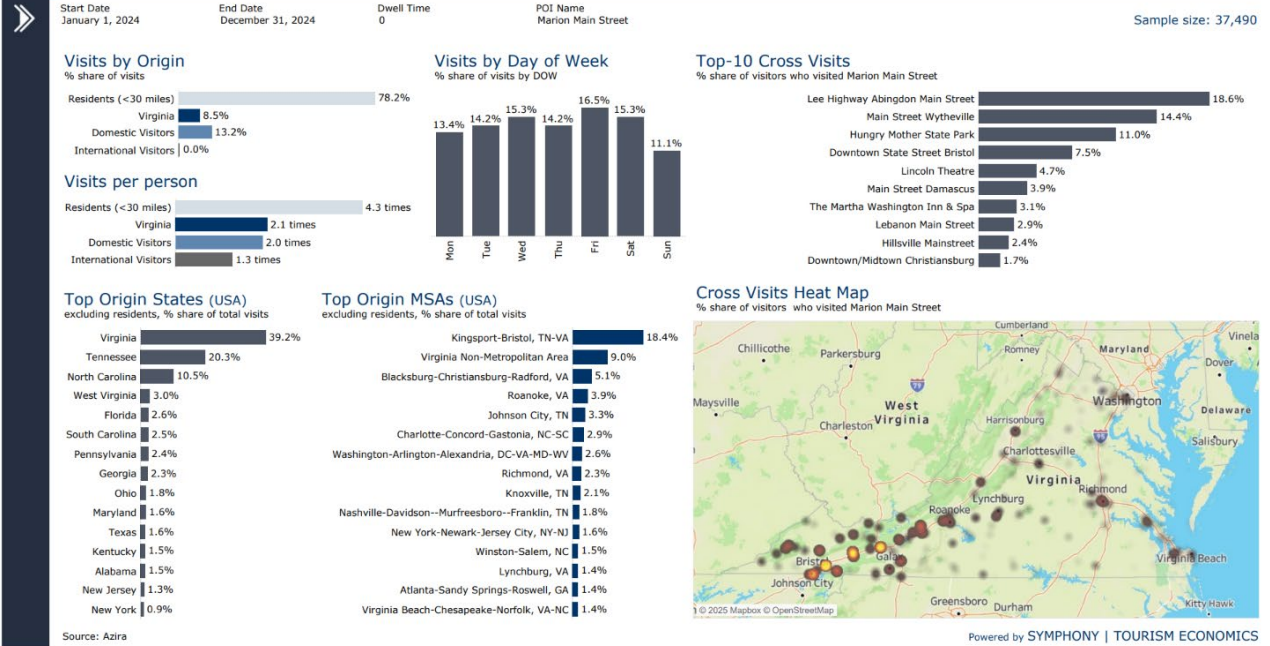


Figure 3. Marion Main Street Visitation Patterns (January – December 2024). Data courtesy of the Virginia Tourism Corporation.

Lincoln Theater in Downtown Marion

The Lincoln Theater is located on Main Street in Marion, VA, and recorded 17,832 patrons in 2024. The building is listed on the National Register of Historic Places, is a Virginia Historic Landmark, and is a 12-minute drive from the Octagon House. First opened in 1929, the theater operates year-round and presents a wide variety of performing arts events, welcoming patrons from across the globe to what is now one of the last remaining Mayan Revival style theatres in the world.<sup>11</sup> According to Figure 4, residents from a variety of states in the region make up the highest percentage of visitors, with Saturday being the most popular day to visit. Its top three cross-visit locations include Marion Main Street, Abingdon Main Street, and Hungry Mother State Park.

<sup>11</sup> About Us. (n.d.). The Lincoln Theater. <https://www.thelincoln.org/about-us>

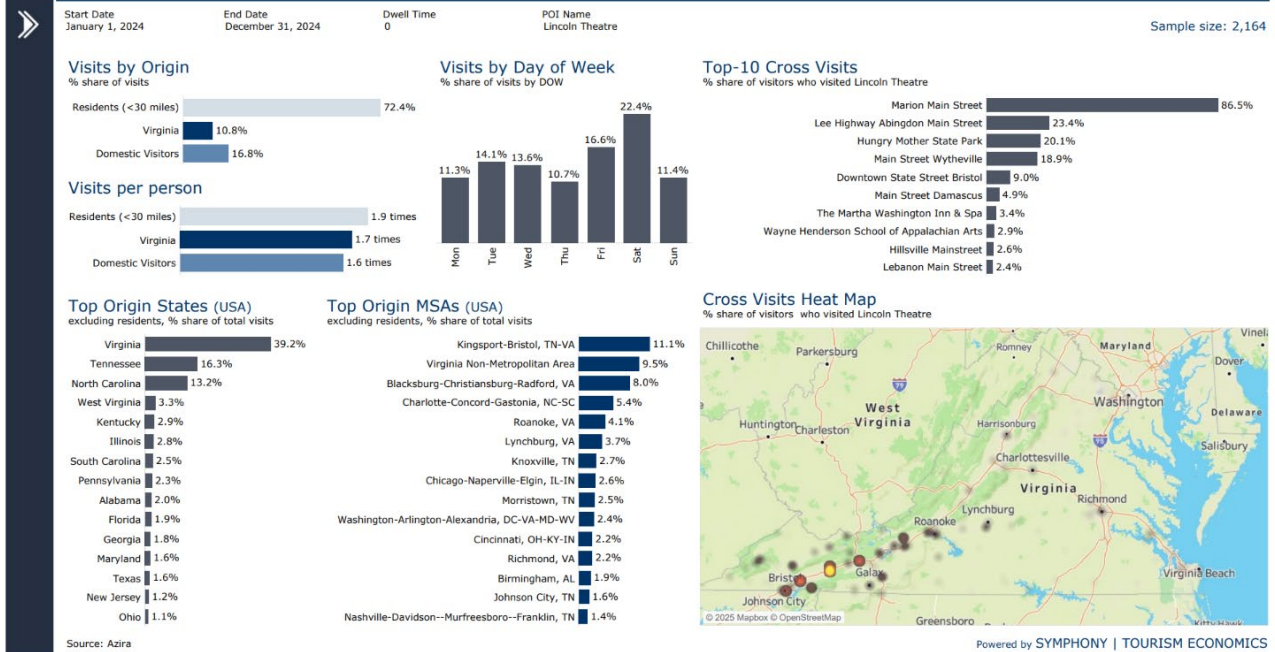


Figure 4. Lincoln Theater Visitation Patterns (January – December 2024). Data courtesy of the Virginia Tourism Corporation.

### Hungry Mother State Park

Hungry Mother State Park features a manmade lake and over 100 acres for hiking, fishing, camping, and other outdoor recreational activities and is a 20-minute drive from the Octagon House. The park was founded in 1939 and the original infrastructure was largely constructed by the Civilian Conservation Corps (CCC). A conference center on site called Hemlock Haven offers meeting and lodging facilities.<sup>12</sup> Several years of past visitation data suggest that visitation rates range from 200,000 - 300,000 people per year. Figure 5 shows high visitation from Virginia, North Carolina and Tennessee residents, especially on the weekends. Its top three cross-visit locations include Marion Main Street, Abingdon Main Street, and Wytheville Main Street.

<sup>12</sup> Hemlock Haven Conference Center. (2025). Virginia Department of Conservation and Recreation. <https://www.dcr.virginia.gov/state-parks/hemlock-haven>

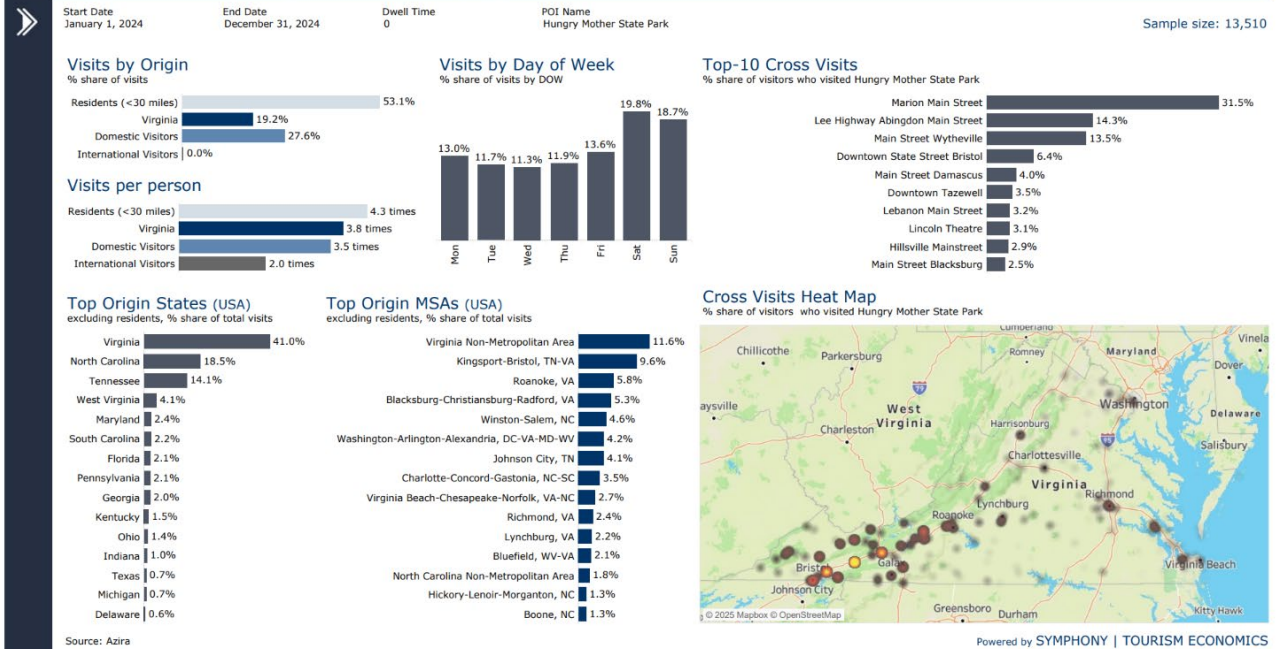


Figure 5. Hungry Mother State Park Visitation Patterns (January – December 2024). Data courtesy of the Virginia Tourism Corporation.

### Other Regional Attractions

#### Museum of the Middle Appalachians

The Museum of the Middle Appalachians in Saltville, VA features natural and cultural salt-related exhibits that span from the Ice Age to the Space Age. The museum is a non-profit organization dedicated to the preservation, interpretation, and research of the Middle Appalachian region. It offers a self-guided experience with the help of cultural interpreters who provide additional information and context.<sup>13</sup> The museum is open seven days a week and is a 30-minute drive from the Octagon House.

#### William King Museum of Art

The William King Museum of Art in Abingdon, VA features contemporary and historic art from the local to global scale, and also hosts the Betsy K. White Cultural Heritage Research Archive, one of the most extensive archives of regional decorative arts information. It is a 34-minute drive from the Octagon House and received 5,000 visitors in 2024.<sup>14</sup>

#### Smyth County Museum

Featured in more detail in the Key Stakeholder Interview section below, the Smyth County Museum is a 12-minute drive from the Octagon House. It receives approximately 2,000 visitors per year.

#### Abingdon Muster Grounds

Featured in more detail in the Peer Case Study section below, the Abingdon Muster Grounds is a 33-minute drive from the Octagon House. It receives approximately 3,000 visitors per year.

<sup>13</sup> Museum of the Middle Appalachians. (2025). <https://museumofthemiddleappalachians.org/>

<sup>14</sup> 2024 Year in Review. (2025). *William King Museum of Art*. <https://williamkingmuseum.org/2024-year-in-review/>

## Virginia 250 Visitor Survey Results

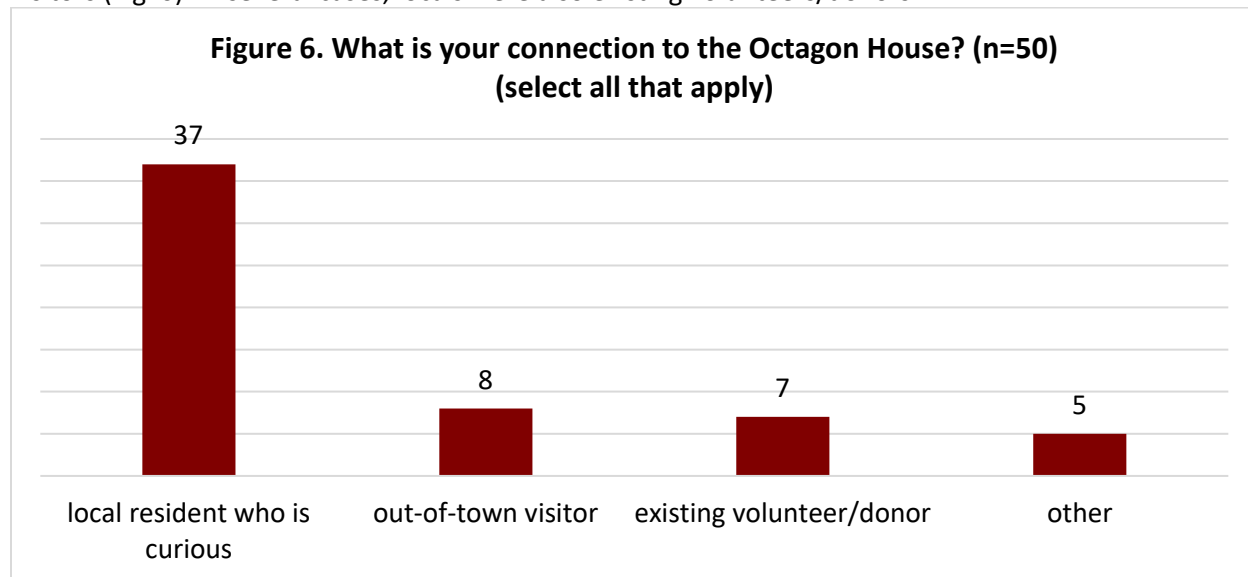
The Virginia Tech team partnered with Octagon House volunteers to administer a paper survey among visitors attending the Virginia 250 event at the Octagon House on July 12, 2025, which included a series of speakers and an open window tour. The effort garnered about 50 responses and the results for all of the questions asked are provided below. The intention of the survey was to sample a group of visitors regarding their interests in the Octagon House and willingness to pay for various services.

### About You

A majority of visitors reported a home zip code in Marion or Chilhowie (Table 1).

<b>Table 1. What is your home zip code?</b>	
<b>Zip Code (Location)</b>	<b>Count of Zip Code</b>
24354 (Marion, VA)	20
24319 (Chilhowie, VA)	9
24202 (Bristol, VA)	2
24211 (Abingdon, VA)	2
24382 (Wytheville, VA)	2
24176 (Franklin County, VA)	2
24375 (Smyth County, VA)	2
24073 (Christiansburg, VA)	2
24153 (Salem, VA)	1
24381 (Woodlawn, VA)	1
37854 (Roane County, TN)	1
24318 (Ceres, VA)	1
24870 (Wyoming County, WV)	1
24323 (Wythe County, VA)	1
24327 (Emory, VA)	1
<b>Grand Total</b>	<b>48</b>

A majority of visitors were locals who are curious about the Octagon House, followed by out-of-town visitors (Fig. 6). In several cases, locals were also existing volunteers/donors.

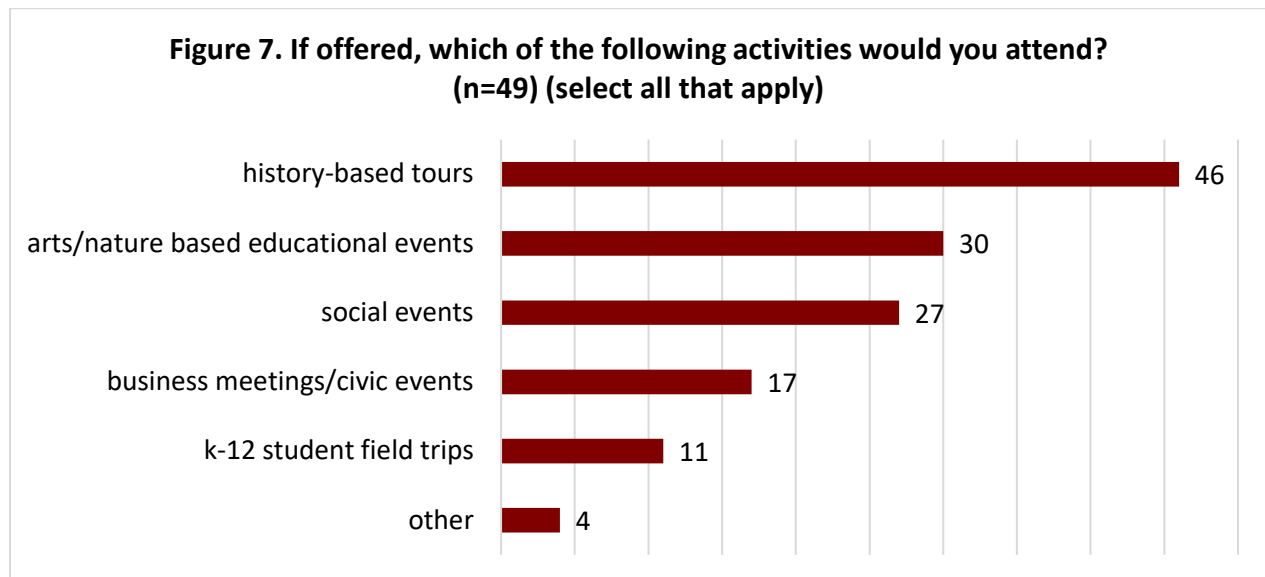


“Other” responses included:

- Descendant
- Member
- Husband related to Abijah Thomas
- Board member

### Future Visits

Visitors were asked about what kinds of activities they would attend if offered at the Octagon House in the future. While respondents often selected several of the options shown below, the most selected item was history-based tours, followed by arts/nature-based educational events and social events (Fig. 7).

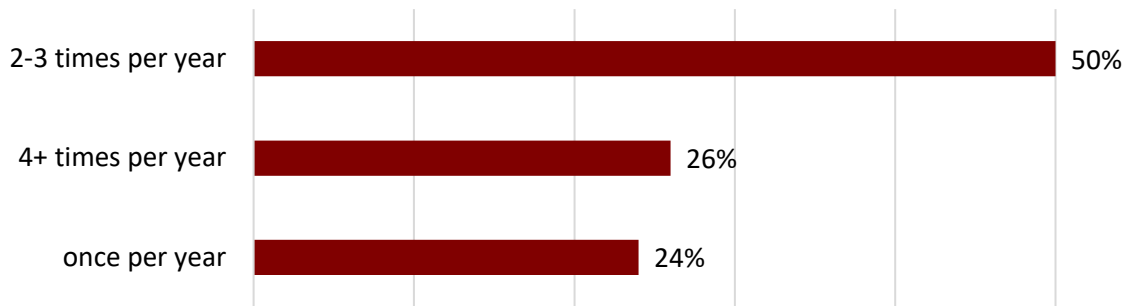


“Other” responses included:

- Haunted / ghost tours
- Ghost tours / paranormal
- Anything – always been fascinated

Half of respondents noted that they would most realistically visit the Octagon House two to three times per year once the programming is up and running (Fig. 8).

**Figure 8. How often would you realistically visit when the house is fully operational? (n=50)**

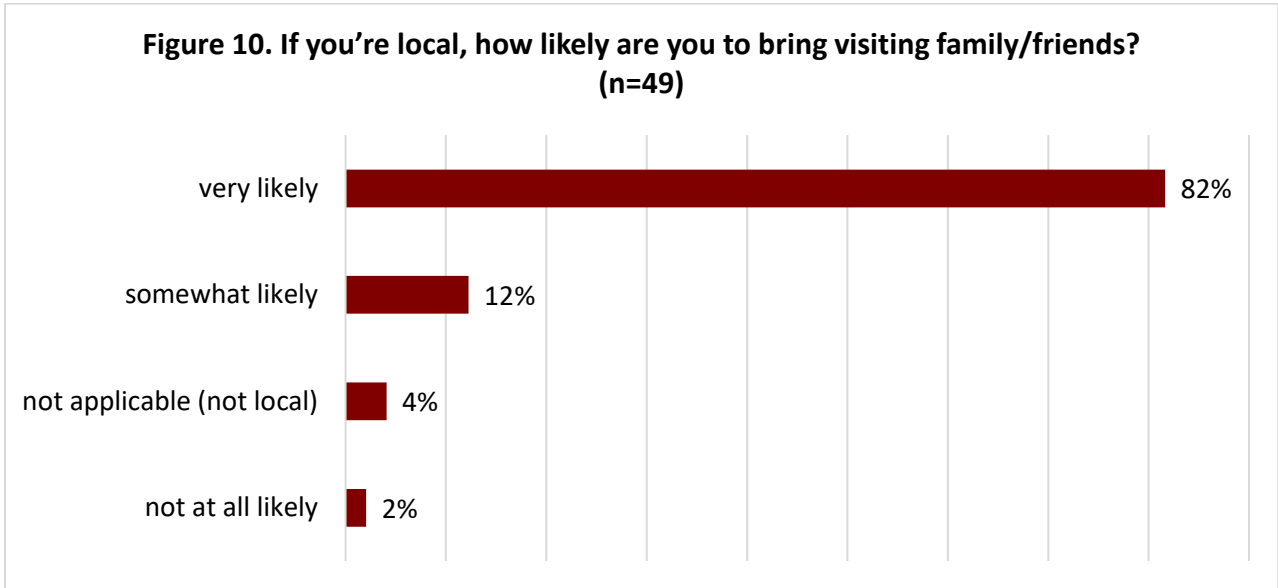


More than half of respondents noted they have children or grandchildren who would visit the Octagon House with them, with slightly more families with children 11 years or older (Fig. 9). This reinforces the market study findings that the Octagon House could help fill a niche in the region by providing programming for families with dependents.

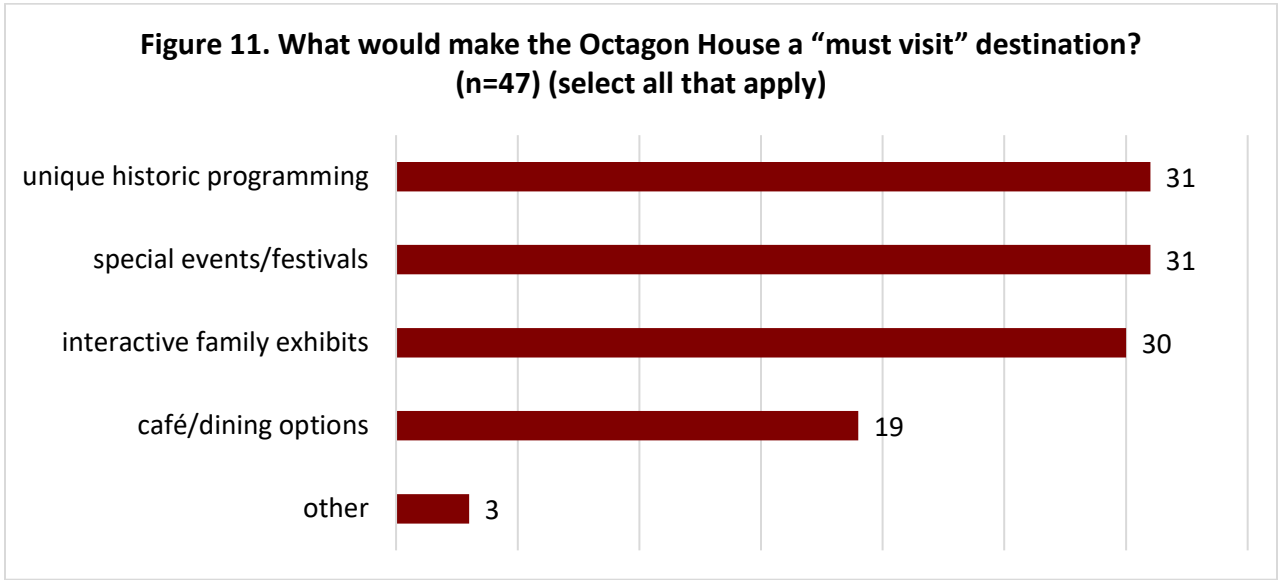
**Figure 9. Do you have children/grandchildren who would visit with you? (n=49) (select all that apply)**



A large majority of respondents who are local are very likely to bring visiting family and friends to the Octagon House (Fig. 10).



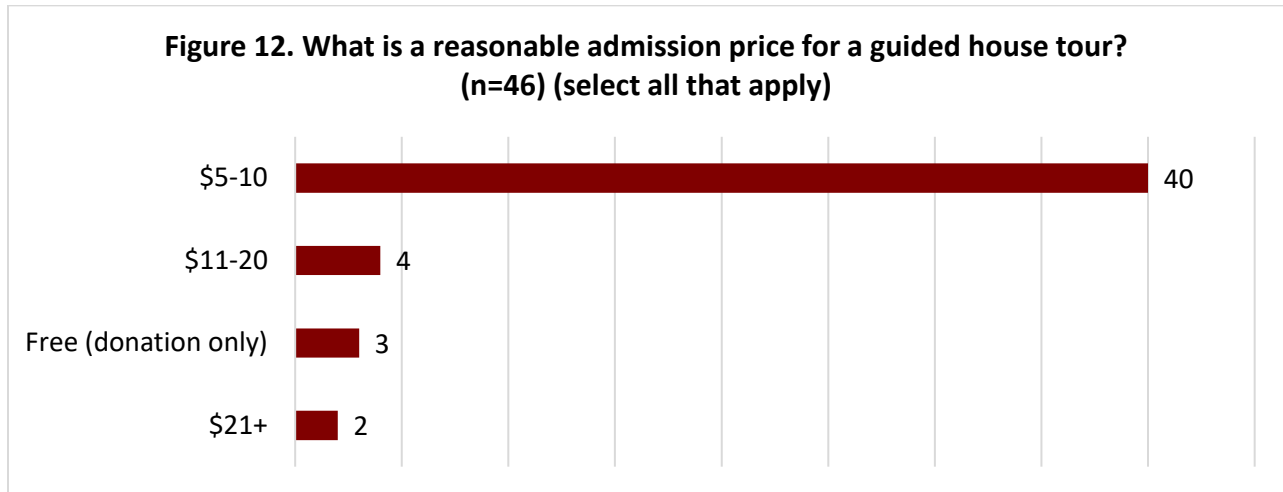
In addition to the activities prioritized above, unique historic programming, special events and festivals, and interactive family exhibits are among the top items that respondents note would make the Octagon House a “must visit” destination (Fig. 11).



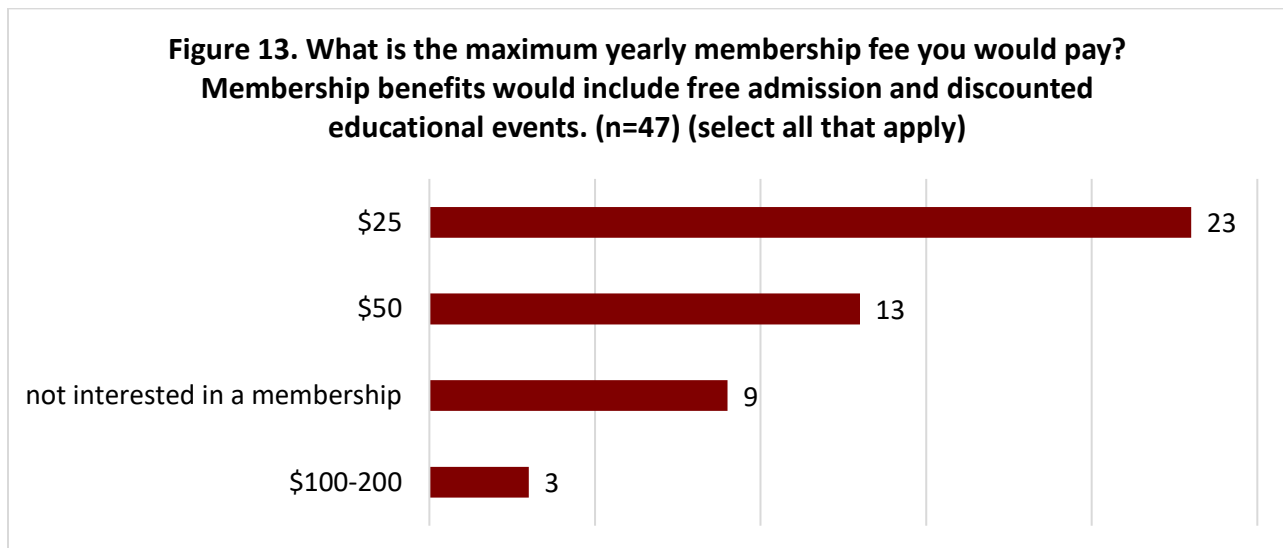
- “Other” responses included:
- Weddings
  - Display historic portraits
  - Area history

## Pricing

A large majority of respondents would pay \$5-10 for a tour of the Octagon House (Fig. 12).



While some respondents are not interested in an annual membership, the most preferred price is \$25 (Fig. 13). For those willing to pay \$50-200, it may be possible to develop a tiered membership program where the higher membership fee provides more benefits.



## Key Stakeholder Interviews

### Methods

The Virginia Tech team interviewed 10 key stakeholders in order to identify strengths, weaknesses, opportunities, and threats (SWOT) pertaining to the renovation of the Octagon House for cultural, tourism, and educational purposes. The stakeholders work in local and regional tourism, education, history and interpretation, economic and community development, local and state government, and wedding venue operations. The interviews were conducted virtually and lasted 45-60 minutes. Detailed notes and transcripts were collected and thematically analyzed to summarize the following information by topic.

## Key Findings

A descendant of the Thomas family and current Octagon House board member provided key insights into the history of the house and the mission of the foundation. The Octagon House was most recently purchased by Derek Orr in 2003; Derek is president of the Octagon House Foundation that was established in 2014. **Mack Sturgill’s biography of Abijah Thomas continues to be a valuable source of information about the family lineage, construction of the building, and historical events that shaped the property**, as do descendant family members living in the region who have historical artifacts such as an old chair and tiles from the Octagon House. There is an Octagon House Society that helps to link octagonal houses across the county; some of the closer ones can be found in Wytheville, VA, and Washington, D.C.

## Tourism

Virginia Tourism Corporation (VTC) is the state entity that provides competitive grants to individual localities such as Smyth County, where the tourism office operates as a Destination Marketing Organization (DMO) that is also financially supported by the county and the towns of Marion, Chilhowie, and Saltville. VTC maintains “visitor profiles” on its website based on types of visitors that detail the spending and visitation habits of residents and tourists. **Some profiles of interest for the Octagon House include the [Arts and Culture visitor](#), the [Black Traveler](#), visitors keen on [Family Fun](#), the [History traveler](#), and as Octagon House develops its venue rental capacity, the visitor interested in [Paid Accommodations](#).** As noted above in the Market Scan, the 2023 Smyth County Visitor Profile Study by the Institute for Service Research also identified a lack of activities for families with children under 10 years old.

Specific to Smyth County, key Points of Interest (POI) include Marion Main Street, Hungry Mother State Park, and the Lincoln Theater. Tourism economics data provided by VTC for 2024 indicates that the top 5 cross visits for Marion Main Street, with a visitor sample size of 37,490, include Abingdon Main Street (18.6%), Wytheville Main Street (14.4%), Hungry Mother State Park (11%), Downtown State Street Bristol (7.5%), and the Lincoln Theater (4.7%). As a secondary tourism destination, the Octagon House needs to tap into these existing flows of visitors to meet a financially stable level of visitation. **The Octagon House can partner with participating businesses and organizations at these POIs to assertively market its programs, hours, and events.** Additional venues for partnerships could include the Civil War Trails or the Tredegar Iron Works in Richmond.

As the Octagon House becomes operational, it is important to maintain regular hours and a steady calendar of events that can be marketed to tourists. (Periodic events, such as festivals or fundraisers, may draw more of a local crowd due to their intermittent nature.) **There is an opportunity to craft special tourism packages that include the Octagon House as part of a weekend or week-long visit.** Families visiting Hungry Mother State Park for a week due to a minimum length of stay will be looking for day trips or local excursions. Tourists interested in niche historical landmarks may be interested in “weird road trips” that include novelties such as the Octagon House, which has already hosted a few paranormal activity groups. There are also Black travel guidebooks that cater to tourists interested in Black history and heritage sites. The legacy of the enslaved people who built the Octagon House can be featured through interpretation about its construction, the industrial labor that was provided, and the recreation of slave quarters on the grounds. Bundling costs and marketing these tourism packages can make it easier for tourists to include the Octagon House in their itineraries. VTC and Smyth County Tourism can post suggested itineraries on their websites to better promote Octagon House throughout the state and beyond.

The Octagon House can also consider “soft adventure” programming that attracts more of the outdoor recreation crowd, such as playing traditional sports or games with antique toys, target practice with antique firearms, or practicing outdoor skills such as starting a fire, setting traps, or harvesting wild herbs and mushrooms. The site may also be appropriate for “dark sky” stargazing and astronomy programs. **Whatever the program, stakeholders recommend a good balance of active programming and living history that immerses the participant in the education for an extended period of time, in addition to passive, self-guided exploration.** Active programming also provides a stronger narrative for marketing materials. Even so, self-guided audio walking tours through the house or grounds featuring QR codes with educational videos can be a way to engage visitors in between active programming.

If the Octagon House is able to create lodging for guests over time, this would help fill a need in the county and could cater to different audiences depending on the goals of the lodging. The caliber and cost of the lodging could vary depending on the visitor profile. For example, there is a private guide who flies guests in for trout fishing, visitors who would be interested in higher-end lodging such as a high-quality bed and breakfast. On the other hand, the Blue Ridge Discovery Center is a remodeled historic schoolhouse in Konnarock that provides dorm-style lodging, a cafeteria, and event spaces for school groups and camps.

The economic benefits of tourism often measure the benefits of a visitor who pays meals tax, lodging tax, sales tax, and who bolsters local businesses through their spending. Secondary benefits can also focus on the staff who are employed by Octagon House who in turn pay income taxes and create a multiplier effect on local spending, as well as partnering businesses such as caterers who can make money through events at the Octagon House. **The Octagon House can work with Smyth County Tourism to collect zip code visitation data to which a standard multiplier is applied to estimate the economic benefit of visitors coming from more than 50 miles away.**

### Museums and Historical Societies

The Octagon House connects with regional history in multiple ways, as an architectural curiosity and through the legacy of the Thomas family with connections to the state’s industrial history, such as cotton refining in Alexandria. It also ties into Civil War history and uplifting the story of enslaved laborers. Stakeholders from local and regional museums and historical societies, such as the Smyth County Museum and Historical Society and the Town of Wytheville Museums, can be important partners for the Octagon House in terms of cross-promoting exhibits, lending historical artifacts such as antique furniture, and documenting the history of the site as ongoing excavations and research continue. **Both of these entities receive financial support from their localities for maintenance and operations.**

### *Smyth County Museum*

Stakeholders from the Smyth County Museum report an annual visitation in 2024 of approximately 2,000 people, estimating that about half of those visitors are from out of town. This museum has the advantage of being located on Main Street in Marion, however some visitors may be deterred due to a lack of adjacent parking. Rather than charge admission, stakeholders note higher attendance by offering free admission and collecting donations. In-kind donations of property and revenue from the sale of property have also been sources of financial support. **The Smyth County Museum has a small exhibit about the Octagon House and also maintains the research materials of Mack Sturgill, a local historian who was working on a book about Abijah Thomas and the Octagon House during the 1970’s-1990’s.** As more publicity circulates about the Octagon House, it is possible that additional local artifacts will surface from within the community, whether family heirlooms with a connection to the site or items that may have been looted when the site was vacant.

### *Town of Wytheville Museums*

The Town of Wytheville Museums operates several historic sites, including a historic homestead on 9 acres with 18 buildings, plus 3 buildings closer to downtown Wytheville. The homestead offers living history demonstrations, active and passive tours, and educational exhibits. It includes a smokehouse original to the site, six log buildings that were brought in, an 1803 cabin, a demonstration kitchen house, open air log barn from Smyth County, a blacksmith shop, a gunsmith shop, a woodworking shop built in 2017 based on colonial floorplans, ADA restrooms in a period-style building, a garden demonstration area, new apple orchard, bee gums, and efforts to construct a new building for three carriages and wagons. **Stakeholders note that it's essential to have several staff or volunteers who can facilitate the live history demonstrations in case one person is not available on any given day.** The museums have sourced period artifacts such as furniture, silver, weapons and other historical pieces from a rich repository locally as well as through communication with other material culture museums, which is also a good way to partner and cross-promote exhibits.

The museums have regular hours during the week but are only open on weekends for special events, a decision that was based on low attendance rates over the summer on Saturdays. The museums are free to local residents in June and July and also on International Museum Day; during the latter, the museums have partnered with the local theater to show "Night at the Museum." Most visitors are from out of town, in part because Wytheville is a convenient halfway point for through-travelers who reportedly stroll the grounds and review the furniture displays in about an hour. The slowest time of year in terms of visitation rates is Thanksgiving to mid-March. **Local residents are more likely to attend periodic special events such as Fastnacht, which is a traditional German feast event held before the start of the Lenten fast, in homage to Wytheville's German roots. The event features live music and regional craft beers, wines, and spirits and raised \$6,000 last year.** Mountain Lynx Transit partners with the museums to run a shuttle from the municipal parking lot downtown to the homestead site during large events.

Rotating exhibits and new installations are important for drawing repeat visitors over time. The museums are planning "Material Mondays," a recurring discussion group that will explore pieces of material culture over time while enjoying refreshments. **QR codes have also been employed throughout the grounds, allowing visitors to scan the code and watch a video on their phone featuring a living history demonstration, such as how to weave a rope using traditional methods.** Engaging material culture scholars and students is another way the museum has extended its reach, partnering with the Museum of Early Southern Decorative Arts in Winston-Salem, which hosts a summer institute for material culture scholars who focus on a region in the south, learning about the furniture, etc. **If the Octagon House engages in archeological digs, material culture is another angle to connect with the Wytheville museums and similar decorative arts organizations.**

Annual maintenance and operation costs of the museums are supported by the Town of Wytheville and grant funding is secured for additional projects and programs. **The financial security provided by the town has been key to keeping up with infrastructural improvements over time, including an item in the town budget to complete extensive renovations on the homestead property such as modern wiring and plumbing.** This also means that the museums have less autonomy politically and must be responsive to the town council, which required the dismantling of a Civil War exhibit after COVID-19. The museums received an endowment of \$250,000 from its advisory board in 2000 that has been growing interest and that is supplemented with ticket sales revenue over time. Sources of grant funding, such as the Commonwealth History Fund and Virginia 250 Humanities grants, are competitive and may

only provide partial awards.

With historic properties, some challenges include unexpected weather that may damage the properties or grounds, as well as the upkeep and heating/cooling of older buildings. The museums have partnered with a window installer that uses magnetized, inter-storm windows with L-brackets that reduce drafts while still complying with historic renovation requirements. The state tax refund for historic renovation is stricter regarding the fixtures and features that can be used, and the process requires fastidious record-keeping of receipts in order to claim the 60% tax refund.

### *Museum of the Middle Appalachians*

Another regional museum, the Museum of the Middle Appalachians in Saltville, VA, has directional signage all the way from I-81 to the museum, which stakeholders partly attribute to its success in attracting visitors. It also has unique displays including the skeleton of a woolly mammoth, which is a special draw outside of major metropolitan museums. **The Octagon House would undoubtedly benefit from directional signage off of I-81 and promotion of its unique attributes to draw more pass-through visitors.**

### **Black History**

Stakeholders are supportive of telling the full history of the Octagon House, including its reliance on enslaved labor to build the structure, maintain the grounds, and power the industrial activity that enriched the Thomas family. Fingerprints found in the hand-made bricks provide a tangible reminder of the presence of enslaved peoples, one that visitors can touch and see despite the passage of two centuries. [An historian specializing in fingerprint research](#) reported that bricks that were displayed in prominent locations with well-articulated fingerprints were intentional, a way for a likely illiterate slave to “sign” their work and acknowledge their presence. In some cases, there may be writing in the mortar itself. Hand-made bricks have even been discovered with the fingerprints of children, some likely younger than 10 years old. A second-grader visiting the Octagon House reportedly noticed fingerprints in the brick lower to the ground left by a child of a similar age, which sparked the search for other fingerprints on the site. **Fingerprints can be found at many historic structures in the region, including a church in Marion built in 1839 with some of the most prints of any structure in the state, connecting the Octagon House to other historical sites for educational and tourism opportunities.**

Efforts continue to be made to link the presence of fingerprints in the brick with historical records of slave holders’ property, which sometimes included the names of the enslaved individuals. **Genealogical research can also help to connect Black families living today with their ancestors who may have left their fingerprints behind.** Many questions remain regarding if and where enslaved laborers were buried at the Octagon House, and whether the former slaves moved further north after the Civil War. However, the historian reported there may be resistance from within the Black community to want to acknowledge this painful chapter of history, or a sense of apathy about something that happened so long ago. Nonetheless, it is imperative to try to connect with local elders who remember their family history before they pass away.

Touching the fingerprints of someone from another time can provoke a powerful emotional response, and **there may be an opportunity to capture these sentiments in a special exhibit that allows visitors to share their impressions of the experience, or to create their own hand-made bricks to appreciate the effort that went into the process.** Other ideas include hosting a scavenger hunt to locate as many fingerprints as possible on the grounds. Dump sites on the grounds can also be sources of brick fragments and other remnants left behind by enslaved laborers. Partnerships with institutions of higher

education should be encouraged to conduct research into the names of the enslaved and conduct archeological field work.

## Weddings

Wedding venues face a variety of challenges and unique considerations, ranging from the fluctuating market, venue location, services offered, and the intensity of the scheduling. We spoke with a wedding venue operator in Abingdon, VA, about their experience hosting weddings for the past four years. Their clientele has steadily grown resulting in 40 weddings last year, charging a base rate of \$3,000 per weekend, which may be a more modest rate compared with the Barns at Chip Ridge, for example. It is also possible to offer tiered wedding packages that escalate in price as additional amenities are included. The wedding venue can make additional money by charging hourly rates to use the site for photography sessions. The market has fluctuated based on inflation, where people are less likely to plan an expensive event like a wedding if there is increased economic uncertainty. This operator has also found that most clients are from the area and within a reasonable driving distance from home because of limited lodging offered on site. While this region has many charms, it does not necessarily have a national or international draw to justify it for a “destination wedding.” **And though there may be saturation occurring among wedding venue options nationwide, the operator we spoke with is optimistic that Marion has not yet reached that saturation point, where a new wedding and event venue can still fill a market need.**

Unless the venue has indoor spaces with climate control, the outdoor wedding season is typically April through October. The spaces can also be used for bridal and baby showers and similar events. **It is customary to provide two separate areas for the bride and groom parties to prepare for the wedding without coming into contact with each other, which requires specific infrastructure, accordingly.** On the same note, there must be enough space to accommodate rain and inclement weather, such as a covered structure that can seat the entire wedding party. The venue will likely need at least two sets of chairs for the larger spaces so that chairs do not need to be moved during the event. The venue will also need a large dumpster to handle trash, especially for larger wedding parties.

Regarding staffing, weddings are an intensive activity requiring dedicated staff to show the property and host visits for event planning, answer the many questions that arise leading up to the event, supervise the event, and manage clean-up and post-event follow-ups with the client. **Staff often work long days for the wedding itself, cleaning, setting up food and decorations, answering many last-minute questions, and even having to navigate family dynamics, so that staffing schedules may need to involve double-shifts or multiple staff members.** Booking single-day events can result in a lot of turnover work for staff, which is why weekend bookings may be preferable. Brides especially put a heavy emphasis on aesthetics and can put significant pressure on staff to create a “perfect” event atmosphere. Some venues have strict requirements regarding which vendors, like caterers, they will work with to help with quality control and must provide clients with a preapproved list of vendors.

It is important to think carefully about the target market for the venue. Is the venue family-friendly, with a playground, games, and activities to occupy kids in attendance? Is it a very polished and high-end experience that will generate larger revenues but that will similarly have to meet higher expectations?

**It is also critical to understand and get ahead of any concerns of the surrounding neighbors and property owners regarding noise, traffic, and increased visitation. The event contract must specify rules related to county noise ordinances and ensuring the privacy of neighboring properties, such as limited uses of drones for photography.** The contract may also need to cover the cost of bodily fluids clean-up and expectations regarding liquor licenses. Larger parties may require the renting of portable toilets. It is recommended to have at least one bathroom per 50 guests, with additional bathrooms in

the bride and groom suites. The bridal suite in particular will need plumbing and lighting, make-up stations, changing areas, etc. Buildings on the site should contribute to the overall aesthetic and provide a variety of “photo ops” free of eyesores like parking, bathrooms, etc. Photographers can make a significant profit per wedding, with a starting rate of \$2,000 per wedding.

Newer venues may benefit from organizing a “styled” photo shoot, where they invite partners such as caterers and photographers to stage a wedding in order to create promotional materials for all involved. In some cases, new venues can charge discounted rates for their initial clients in order to build up their marketing materials, such as promotional photographs and videos that can be shared on social media and the venue website to build new customer interest. New venues can also host open houses to introduce prospective clients to their location. **Word of mouth is still a very effective marketing strategy as well, where event guests share their positive experience with friends and family or where people in attendance book the venue for other future events.** Free positive reviews online can be just as effective as paying for leads through wedding connection sites in terms of generating business. A lot of advice for new wedding venue operators may be gleaned from online forums on Facebook and similar social media platforms.

## Education

The historical context for the site has rich implications for history education. As a land baron and business owner of the Holston Woolen Mills and several other ventures, Abijah Thomas’ industrial activity spurred community growth in Smyth County in ways similar to the region’s coal mining towns that sprung up to support coal production. Thomas’ pig iron plants also supplied the Confederacy during the Civil War and provides a case study for the rise of industrialism within Southern culture where the construction of the Lynchburg-Bristol railroad in 1857 led to an influx of enslaved labor in the region.

Interviews with a former principal/superintendent and a current history teacher in Smyth County indicate there are several opportunities as well as challenges to connecting experiential learning at the Octagon House with school programming. The public schools have a high graduation rate among high schoolers and are encouraging programs that lead to meaningful employment or continued higher education, such as the [Smyth Promise](#) program that covers several semesters of tuition at an area community college if students meet a specific grade point average and volunteering quota. **The Octagon House could offer internships or apprenticeships in a variety of vocational areas, including groundskeeping, historical interpretation and experiential education, or building trades, construction, and renovation, in order to engage more students in its mission and provide employment pathways.**

As noted elsewhere in the report, partnering with institutions of higher education such as community colleges could manifest through work-study positions with students, semester projects, or connecting with faculty expertise for nonprofit development, archeological research, interior design renovations, virtual reality historical recreations and reenactments, and a number of other opportunities. There may be virtual educational opportunities as well if the Octagon House history can be packaged for online learning modules and credit-bearing courses.

Teachers within the Smyth County school system have visited the Octagon House in the recent past as a part of their professional development, to better understand the history of the region and to help newer teachers, due to regular turnover, feel more connected to the area. However, the Octagon House is not the focal point for this trip every year and it is not clear from our stakeholder interviews if this effort has led to more teachers being interested in using the Octagon House for educational programming and fieldtrips aligned with the Standards of Learning (SOLs) within their subjects. **SOLs have created strict course requirements that leave little room for additional programming throughout the school year, which is why the Octagon House will need to explicitly link its offerings with the SOLs**

**in order to engage teachers and their students, as well as address logistical and funding challenges.** On the other hand, stakeholders report that teachers ask for recommendations of good fieldtrip locations on a regular basis.

Because American history is taught in 11<sup>th</sup> grade and Virginia history is taught in 4<sup>th</sup> grade, these two grades may provide a logical starting point to connect Octagon House history with school standards of learning. The Octagon House ties into the Antebellum, pre-Civil War era history module that is taught around the midterm for 11<sup>th</sup> graders, including a focus on Sherman's total war in southwest Virginia that likely would have destroyed the Octagon House had Union soldiers stumbled upon it moving along what is now Route 11. Union soldiers did likely ransack the house during Stoneman's march in 1864, but did not have a directive to destroy civilian structures at that time. Connections can be made in several other topic areas from English, focused on period literature or books such as Mack H. Sturgill's biography of Abijah Thomas or *The Octagon House: A Home for All* by Orson S. Fowler, to physics focused on the structural integrity of the octagonal building architecture and calculating building loads.

**Stakeholders report that Smyth County schools educate nearly 4,000 students each year from kindergarten to 12<sup>th</sup> grade across seven elementary schools, three middle schools, three high schools, and one trade school/career center. Neighboring school districts in Wythe and Washington counties could funnel additional students to the Octagon House for programs and fieldtrips as well.** An architectural program for high schoolers in Franklin County was also mentioned as a connection point to engage students interested in the building trades.

However, a history teacher we spoke with explained that it takes extra time and effort to coordinate fieldtrips for students, effort that falls on individual teachers with a very limited budget, where the school may only cover transportation. This means that the price per student needs to remain affordable for families to pay out of pocket, averaging \$15 or less per student per trip. The history teacher has taken a small group of 11<sup>th</sup> grade dual enrollment students on a regional history tour each year since 1999, which includes a stop at the Octagon House, because the course material is spread out over a year and allows for enough time for a fieldtrip. For all other 11<sup>th</sup> grade students in the semester-long American history course, there is not enough time to include a fieldtrip. **For the schools to be a viable source of program revenue for the Octagon House each year, there will likely need to be buy-in from school leadership to identify funding and develop a formal partnership with the Octagon House to engage students annually at a large scale.**

The educational value of students visiting the site in person cannot be understated; students of all ages are more inspired to learn local history if they can physically explore the place, interact with tangible elements of history, and develop a personal connection to the historical narrative. This also helps to cultivate a longer-term appreciation for the past that can grow membership for historic places like the Octagon House.

### **Economic Development and Community Engagement**

**A delegate representing Smyth County recommends positioning the Octagon House within a larger economic development strategy to market southwest Virginia for its natural beauty, access to outdoor recreation, and unique geographic location among Virginia's highest peaks.** Because of its more rural character, ancillary historic structures are still standing and have been left untouched by the rapid growth and development more common in other parts of the state, which allows for additional historic renovations and recreation. The attraction for people living and working in the region includes the relatively affordable quality of life and broadband and internet access facilitating remote employment, all while being situated within a beautiful natural setting with easy access to hunting, fishing, hiking, kayaking, etc.

The Octagon House is a well-known community landmark and there is excitement among community members to see it restored for education and other community uses. The Octagon House has partnered with the local fire department to provide concessions at the weekly bingo night, which raises modest revenues but also serves to publicize efforts to restore the building and market upcoming events. Stakeholders are not naïve to the financial challenges ahead, including the millions of dollars needed to complete the renovation and provide ongoing maintenance. Multiple uses for the structures, including daytime, evening, and weekend programming, may be essential to generate adequate revenue. Naming rights for new structures as the site grows may help to generate sizable donations, or naming smaller items throughout the property to generate ongoing donor involvement. **Momentum for the project will also need to keep pace with community interest as well as volunteer engagement; there may be a need to develop a volunteer succession plan to ensure that aging or transitioning volunteers will be replaced with new participants on a reliable basis.**

**There is an obvious need for community meeting space for a variety of event types including baby showers, family reunions, graduation and retirement parties, etc. based on the number of rental requests that the Adwolfe Volunteer Fire Department receives each year (they host over 100 rentals per year typically on Saturdays during the warmer months).** Stakeholders suggest that an event venue for up to 500 people may be needed in the county. Other existing meeting locations include Hemlock Haven conference center at Hungry Mother State Park, the Francis Marion Hotel, the Lincoln Theater, church fellowship halls (though these may limit rentals to members within the congregation), and the country club. Youth and civic groups active in the area could also benefit from additional meeting space and volunteering opportunities, including the Lion’s Club, garden clubs, Ruritan groups, and Boy and Girl Scouts. Eagle Scout projects could contribute to smaller scale site and ground renovations at the Octagon House over time. Additional day trips may be of interest to round out summer camp programs offered at Hungry Mother or by local churches.

County leadership we spoke with noted that the interstate exits in Smyth County are not very developed in terms of hotel and restaurant options. This can hurt the tax base and deter thru-travelers from stopping and staying in the county. One of the challenges to acquiring this land for development is a lack of interest among current property owners, including VDOT, though some development of amenities may be underway once wetland displacement issues are addressed. **Traffic along the southwest corridor of I-81 has reportedly increased due to the opening of the casino in Bristol, VA, so capturing some of this market in Smyth County would be further facilitated with more amenities along the exits.** A member of the county board of supervisors reflected on the challenges of attracting employment to Smyth County, such as a large manufacturing facility, and recognizes the growing opportunities for tourism employment. Nonetheless, tourism industry jobs may be seasonal and lower-paying.

County leadership can help to facilitate conversations among developers and area attractions, such as the Octagon House, to attract investment and justify the need for new development along I-81. Similarly, the addition of recreational fields in the county could increase youth and family traffic to the area, but these travelers need a place to stay to extend their stay in order to include additional activities, such as a visit to the Octagon House. **As noted elsewhere in the report, visible and regular signage guiding visitors off I-81 to the Octagon House will be an important marketing tool to increase attendance and awareness. VDOT may offer grant funding to install brown signage denoting a historical attraction.**

Finally, the Octagon House should continue to generate awareness and buy-in from state leadership to support the restoration project. While the [budget amendment](#) proposed in the 2025 legislative session to provide \$2 million for capital improvements of the Octagon House did not pass, it is an important

first step in introducing the project to state legislators. Board members should identify champions and advocates within the General Assembly in Richmond among relevant legislative committees. **Elected officials may be more likely to partially fund the restoration campaign if there is interest from private investors as well.** For example, [The Inn at Foster Falls](#) is a renovated 10-bedroom boutique hotel that was originally built in 1887, now nestled within New River Trail State Park. The building was acquired by the Virginia Department of Conservation and Recreation in 1995 but its operation as a bed and breakfast is contracted out to a local hospitality company, New River Retreat.

### Octagon House Board

The foundation's board is comprised of a variety of stakeholders, some with family ties to the property and others who are local community advocates. As with all nonprofit boards, members should understand the mission of the organization and participate in strategic planning, budgeting, fundraising, and business planning together. Board members may have particular success attracting larger, regular donors from within the community in an effort to sustain revenues year-over-year. The board can also play an important role in identifying new volunteers and retaining volunteer support over time, and can ideally oversee the transition of the organization from volunteer-led to staff-run. Finally, it is important to rotate new members onto the board on a regular basis, to diversify board membership and bring new insights, ideas, skills, and expertise to the table. **All board members, new and established, will benefit from continuing education regarding financial management, succession planning, volunteer recruitment, marketing and storytelling.**

### A Note on Partnerships

**Multiple stakeholders reported that collaboration among area museums, libraries, and cultural heritage sites for the Virginia 250 celebration this year has been so productive, they would like to see these kinds of collaborations continue, such as the development of a permanent cultural institution coalition.** The collaboration has received grant funding and generated web content and marketing materials to promote a series of events focused on the history of the American revolution in the region. A previous effort led by Friends of Southwest Virginia and Emory & Henry intended to connect museums throughout southwest Virginia using an [interactive online map](#), however stakeholders indicate that support for this project waned, and the map is not being actively maintained.

## Peer Case Studies

### Methods

In order to conduct this portion of the study, we initially reached out to 19 different historic sites. These sites were selected with several conditions in mind, including property size, ties to Antebellum and Appalachian history, current types of programming, and whether they have an octagonal house, and we prioritized those sites most similar to the Octagon House and the foundation's future plans. Outreach was conducted primarily via email, and we received timely responses from several sites that were willing to share information about their organizational structure, staffing and volunteering, programming, budgets, strategic planning, and key lessons learned.

Of the 19 sites that were contacted, a subset of five sites responded and were interviewed with the understanding that a case study profile would be developed about their location. Interviews were conducted virtually with different types of staff including site directors, program managers, and other senior staff members. These semi-structured interviews allowed us to collect key data across each site but also account for the unique experiences of each individual historic site. We were able to acquire both qualitative and quantitative insights, as well as supplemental materials that can be found in the appendix section of this study.

There were several challenges that arose while conducting the case studies, including a low response rate and institutional restrictions on providing supplemental materials or more specific data regarding annual budgets and strategic planning.

Data collection was conducted through various methods, including but not limited to interviews, review of interview transcripts, follow-up correspondences, and the analysis of supporting materials, some provided by the historic sites and others acquired by external search efforts. Information was organized into a standardized case study framework. This methodology was selected not only to ensure consistency across a variety of historical sites, but also to allow for nuances specific to these unique sites.

## Key Findings

Across the case study profiles are several key findings that are especially relevant to the Octagon House Foundation. **First, each historic site mentioned the vital importance of maintaining several paid staff members.** While volunteer participation remains an important element in a site's operations, volunteer efforts are best reserved for supplemental support of an already established infrastructure of paid staff. Without staff, sites are in danger of inconsistencies and burnout. In addition, maintaining a core staff structure ensures a level of dedication and familiarity with long-term goals that is necessary to meet milestones.

The second key finding is in reference to community engagement, visibility, and identity. **Staff at all sites stressed how a dynamic community engagement approach is essential to sustainable partnerships and long-term success in the region.** Approaching program development in collaboration with organizations and individual members of the community provides a unique opportunity for the Octagon House to establish itself as a centerpiece of support. Additionally, engaging with these groups will allow the organization to leverage their expertise to create unique, high-quality opportunities for a variety of demographics. Consistent visibility is also made possible through these efforts, and proactive identity-building is accomplished organically as continued collaboration with dynamic groups takes place.

The final key finding from these historic sites pertains to funding momentum. In selecting interviewees for the case study profiles, several different organizational structures were included. **All sites, regardless of how they are organized and financed, reinforced the importance of securing adequate funding to streamline the initial phases of development.** Not only does early funding allocation sustain momentum, it also maintains stakeholder and community enthusiasm and support for the project.

## Case Profile 1: Duke Homestead

### *Organization Contact Name*

Julianne Herczeg, Site Manager

### *Location*

Durham, North Carolina

### *Year Founded*

Duke Homestead was originally built in 1852, gifted to Duke University in 1931, added to the NRHP in 1966, and transferred to the State of North Carolina in 1973.

### *Organizational Structure*

The Duke Homestead Education and History Corporation is a 501(c)(3). As a state-owned landmark owned by the North Carolina Department of Natural and Cultural Resources (DNCR), the site is embedded into this larger institutional structure. Within this framework, it is considered a part of the North Carolina Division of State Historic Sites and Properties, which has a mission to preserve, operate, and interpret historic sites across North Carolina through programming, education, and conservation.

### *Number of Paid Staff*

Duke Homestead has 4 full-time and 3 part-time employees with a job posting open for “Historical Interpreter II” at the time this report was written. These employees are paid by the State of North Carolina, and all employees are considered state employees.

### *Roles of Volunteers*

There are 14 youth interpreters who help with special events. Duke Homestead hosts a monthly living history skills workshop that requires the help of this group of volunteers. There are 16 junior interpreters (ages 13-17) and 8 graduated high school senior interpreters. Two regular adult volunteers come 1-3 times per week to help with visitor services and tours. In addition, there are several support group members who come to assist with special events and one gardening volunteer who works on the site on a regular basis.

In terms of special events, Duke Homestead has thirteen special event volunteers that contribute on an invitation-only basis for specific gatherings. The volunteers are not associated with one another in any capacity. In other words, they are not a formal reenactment group. The demographic of this group includes retirees, graduate students, reenactors, historical interpreters, and former part-time employees.

Duke Homestead has found that opening the site to diverse volunteer opportunities has allowed for meaningful regional partnerships. They have invited high school students to participate as part of work-study internship programs with their school. Typically, students will come once a week during the school year to direct visitor services and learn how to guide tours. The site also engages community service workers with previous criminal history, when they fall into certain non-violent categories, to assist with maintenance. In addition, community groups and local museums volunteer at special events or collaborate on specific projects as part of ongoing program partnerships.

### *Description of the Board*

The Duke Homestead Education and History Corporation makes up their board. They maintain a strong

working relationship, as most of the board members run in similar social circles. The organization is an official non-profit with a Memorandum of Agreement with the state/site and are made up of 18-20 members at large. The leadership positions include a president, vice president, treasurer, and secretary. The Duke Homestead's board's primary role is to support the site financially through fundraising events, grant writing, and dues. They assist in purchasing items that are more difficult to acquire through state funds and procedures, and they pay for everything from building projects on the site to special event performers. The board used to be responsible for compensating part-time employees, but they no longer are.

The terms of membership require donations to the organization, as well as a meeting on site at Duke Homestead every other month. They have members-at-large who vote in place on business and come to meetings. All business must be decided upon with the staff; the site manager is a de facto non-voting member and attends all meetings. As of now the board is collaborating with the staff to accept a large gift from the Duke Endowment, which will require the staff and board to work closely with one another in the coming months. If there are any disagreements, it is typically concerning required state procedures. More specifically, the board occasionally has issues with the state's required procedures delaying the timeline for purchasing necessary items. Because of bureaucratic stagnancy, operational expenses for some programs are not taken care of in a timely manner.

### *History of the Organization and Site*

Duke Homestead is one of 27 historic properties managed by the North Carolina Division of State Historic Sites and Properties, which is responsible for the historic interpretation of the state's history and key landmarks. Its historical significance focuses on agricultural and industrial practices, as it was the home of Washington Duke and his family during the founding of the American Tobacco Company in the 19th century. Though not a plantation, the site was the birthplace of industrial innovation, similar to the Octagon House, with its focus centered around tobacco manufacturing and packaging. The decision to pursue this industrial enterprise early on by Washington Duke was what created the tobacco empire that largely characterized the American Industrial Revolution.

Characterized as a family farm of around 300 acres, Duke Homestead was built in 1852 by Washington Duke. During the Civil War, Washington Duke was drafted into the Confederate Navy, and the farm was reportedly looted by the Union Army while he was away. With much of the farm's resources depleted or destroyed, the Duke family was forced to explore new forms of livelihood, which led to the packaging of tobacco products. After the war and following Washington Duke's return from the North, the Dukes shifted more towards tobacco manufacturing altogether. This led to the inception of the economic empire and the founding of the American Tobacco Company, and later Duke University. The American Tobacco Company became a monopoly, with its primary competitor being R.J. Reynolds of Reynolds Homestead, and the company was eventually restructured into four major tobacco companies (the Big Four) by the Sherman Antitrust Act in 1911.

### *Lives of Enslaved People*

The structure of enslavement in Lenoir County and Orange County, and this region of North Carolina more broadly, was different than that of larger plantations. The slaves were owned by the local government or a wealthier plantation owner, and they were tasked with working on multiple smaller farms like that of Duke Homestead. It appears Washington Duke's empire had not taken off to the capacity we are familiar with today until after the Civil War and the beginning of tobacco manufacturing on the site.

Though a small farm, the lives of two enslaved individuals are featured in the site's interpretative materials to provide insight into how even more modest landowners were connected to and sustained the institution of slavery. One was named Caroline, a house slave, who was purchased by the Duke family in 1855. The other individual was named Jim, who was an enslaved laborer whose services were leased out by Lenoir County and Orange County to Washington Duke and those who resided on neighboring farms. Though there is little documentation of the lives of these two individuals, Duke Homestead provides information and programming about what they do know about them.

Jim was born into slavery around 1830, and he spent the majority of his adolescence on James W. Cox's plantation in Kinston, North Carolina. He actively resisted enslavement and attempted to escape at least three times. In his attempts to run away, Jim would not run north but would rather escape towards neighboring properties where his missed loved ones resided. Jim also resisted enslavement by refusing to work, and in a letter written by T.B. Morris to his slaveowner, Morris complained that Jim worked intentionally slowly and damaged crops on numerous occasions. After the Civil War, Jim got married to another enslaved woman named Martha, and he spent his life in Orange County as a sharecropper until 1885.

Caroline was separated from her mother and sister because of the Duke family's purchase of her. She was a house slave and resided in the upstairs room of the Duke home with Washington Duke's children. She is likely the same individual as Caroline Barnes, who was cited as Washington Duke's housekeeper who was present at his death in 1905. Census records linked her maternal lineage as the same individual, but there is still some speculation.

### *Industrialization*

Duke Homestead and the Octagon House are both sites of the history of early industrialization in the southern United States. The State of North Carolina originally decided they wanted three historical sites to highlight the three main industries in the state. Duke Homestead is positioned as the state's tobacco museum and helps to highlight its factory and manufacturing lineage. The exhibits are not only about the Duke family, but also about tobacco history more broadly.

### *Activities and Programming*

Most of Duke Homestead's programming is dedicated to educational outreach, as this is their main visitor attraction. Many field trips are hosted on the site. Their partnership with the surrounding school systems is integral to the success of their programming. They mentioned how they base their programming on what teachers and administrators communicate there is a need for, which allows for dynamic programming opportunities throughout the school year. In addition, there are several light recreational draws, as visitors who participate in self-guided tours will walk to each of the outdoor structures located on the property with the guidance of a map and informational brochure.

There are more than 40 interpretive cast members at Duke Homestead. The site manager is certified in teaching interpretive training, and she emphasized the importance of having interpreters undergo this certification process prior to doing interpretation on their site. This ensures a sensitivity towards the historical narratives presented, as well as maintaining historical accuracy in the type of interpretation that is expected at Duke Homestead.

Duke Homestead does educational programming around archaeology. The field trip program is tailored to students from 3rd through 6th grade. Students learn basic principles of archaeology and its importance in uncovering the lives of people who did not leave written records. Students participate in

hands-on daily work activities, learn about historic games, and engage with interactive artifact simulations. There is also a factory building original to the site that they use for interpretation about industrialization and early manufacturing practices. Duke Homestead recommended the Octagon House consider opening a field site that would be available to various universities for research endeavors and higher education programming. This is not only applicable for archaeology, but architectural programs as well. Students could come to participate in sketching workshops or have architectural history lecturers come to discuss the significance of the structure and its unique design. Opening up this space for research has been beneficial for Duke Homestead both in strengthening university partnerships and promoting community engagement.

### *Event Venue/Special Events*

The site's most popular event is their Christmas by Candlelight Series. This is an annual holiday event where the organization recreates a Duke family Christmas of the 1870s. Guests follow a candlelight guided tour through the grounds and buildings of the site, and interpreters in period costume portray life during the time period and holiday season. Duke Homestead charges a small fee for the tickets: \$8 for adults, \$4 for children ages 3-12, and no charge for children under 3 years old. This charge is for specific tour times that visitors have the option to select, and the tours depart in ten-minute increments. Each tour is limited to a total of 20 people to ensure the guide has a visual of all visitors and can answer their questions in a timely and informative fashion. The Christmas by Candlelight Series takes place every Friday evening in December, which allows visitors the opportunity to come more than once and bring different groups. It is common for visitors to repeat their visits because they bring different types of groups ranging from friends, family, work colleagues, and more.

Duke Homestead additionally hosts an annual Halloween event called Phantasmagoria. This event is mainly marketed towards older students residing in the area who attend Duke University or who have come for a campus tour. During this event, they provide several paranormal and supernatural attractions. With period interpreters in costume, themed "encounters" reflecting ghostly illusions, and self-guided exploration of the grounds with flashlights, this event mirrors the Victorian-era fascination with the supernatural. There is a large medical community in the region, so embalming and fortune telling is a popular attraction for them at this Halloween event.

In terms of private events, Duke Homestead has several private rental packages that are available for organizations or individuals to purchase. Smaller events that can take place in their picnic area are the most common, including baby showers, work outings, wedding showers, and more. Different departments at Duke University (i.e., Duke Health Pediatrics) will often rent the space's auditorium for special lectures and alumni programming. Additionally, various garden club workshop events are hosted on the site using the garden beds on the property, which is a mutually productive partnership that educates volunteers and beautifies the space.

According to Duke Homestead, there are not many weddings or wedding-related events hosted at the site. Many of the properties owned by the state have a ban on weddings due to cultural insensitivity. It is "extremely poor taste" for them to host a wedding at a tourism site where individuals were enslaved, according to the interviewee. The only exception in their case is if a descendant of an enslaved person who worked on Duke Homestead requested to have a wedding there.

### *Organizational Growth*

Duke Homestead was first restored by a member of the Duke family in the 1930s. Early visitor interest largely surrounded the old narrative that America was built by the great industrialists of the nineteenth

century. The rags-to-riches story not only inspired visitors, but underlined the attitude characterized by many North Carolinians who resonated with the Duke family and their contribution to the state's collective memory.

### *Visitor Experience*

There are multiple ways visitors are able to engage with the site. The property has seven historic structures, and people are able to walk around at their leisure for a self-guided tour. Following the self-guided tour around the outside of the property, visitors typically make their way to the museum where they view the exhibits on their own. The Tobacco Museum is 5,500 square feet and is filled with artifacts from early farm life, especially related to the processing, manufacturing, and marketing of tobacco. In addition, there are 45-minute guided tours led by volunteers that are available from 10:15 a.m. to 3:15 p.m.

### *Key Partners and Funders*

Several of Duke Homestead's key partners include Duke University, The Duke Endowment, local tourism magazines, local marketing networks, and the North Carolina Civil War Trails. Their key funders include the North Carolina state government, the Duke Endowment, and various private donors, including but not limited to several descendants of Washington Duke. Any changes to event fees or major pricing adjustments must be approved by State Congress. The majority of funds not provided by the state are from private donations, collected both on and off-site. Duke Homestead's main website is a fundraising page where private donors can submit their donations online.

### *Competitors and Market*

Duke Homestead is connected to several regional development and tourism organizations. They are part of a thriving local arts and culture ecosystem where everyone works together to highlight one another's programs and offerings. Local tourism networks highlight programs and connect them with one another, and sites are able to submit upcoming programs for network-wide marketing initiatives on a regular basis. Duke Homestead noted how they do not have a marketing budget allocated for them, so this exposure is extremely helpful in their efforts to spread awareness of their programming and special events.

Duke Homestead is connected with two additional local institutions by state funding. These sites include Bennett Place (where the second surrender of the Civil War took place) and Historic Stagville (one of the largest plantations in North Carolina). Each of these sites is connected to the community tourism network in Durham. Because they are owned by the state, Duke Homestead has a mutually beneficial relationship with the other locations mentioned. The Homestead annually attracts more visitors than its sister sites so it plays an important role in referring visitors to these other destinations.

### *Financial Snapshot*

Duke Homestead's pricing structure is determined by the state's legislative system. As a state historic landmark, legislators decided to make admission free for individuals to visit all historic sites under its jurisdiction. While this is the standard for self-guided visits, guided tours are allowed to be monetized, and Duke Homestead chooses to require a small fee for the experience. The pricing structure is simple, as adults are charged \$2 per person, and seniors, children, and military personnel are charged \$1 per person. The grounds and green space are free to visit at all times. Because the prices are so low, there are large donation boxes placed around the site where people frequently donate. Around \$500 a month comes from these boxes. Besides state funding and private donations, this is an important revenue source for the site. Duke Homestead also has a gift shop that is fully operated by volunteers, where

100% of their “earnings” go towards in-kind donations.

Duke Homestead’s top three revenue sources are state funds, private donations, and the Duke Endowment. Their top three expenditures are staff salaries, utilities/security, and equipment, as described by the interviewee:

“Staff salary, hands down, most important. Museum employees deal with a LOT, for little compensation, and put their entire heart and soul into the place. It's often more than "just a job" to history people. They need proper compensation. Well-paid staff bring more enthusiasm, better ideas, and are the lifeblood of the institution and its programming. #2, you do need to budget properly for utilities, safety, and security. Alarm systems are expensive, but you can't have the place burning down because your system is obsolete. And, if your buildings are crumbling, people will feel unsafe. #3, equipment/resources to make everyone's lives easier, and shows good customer service - investing in things like good lawn mowers, site vehicles, computers, water fountains, etc. This could also be items visitors need for daily programming, special events, or school programs. Visitors won't come if the site looks janky, and they won't come back if programs are barren and uninspiring.”

When asked what their biggest concerns regarding funding were, the interviewee said:

“We are preparing for a recession right now. While we don't believe we're in danger of shutting our doors, there are talks of things like employee furloughs. We are a lucky site with a healthy revenue fund from our special events, tours, donations, and even rent from a small rental house offered to employees.”

The site has two distinct budgets: one is a state appropriated budget that comes from the North Carolina State budget released each year, and the other is a site-specific revenue fund that is unique to each historic site. The state appropriated budget covers salaries, utilities, and lost safety and security costs. This budget largely covers operational expenses, but it is responsible for covering the 27 state historic sites across the state, so as discretionary funds are spent, they are redirected from place to place. This is often problematic, as emergency expenditure for one site may mean another site no longer has funding allocated for its own needs. In essence, the site coordinator at Duke Homestead is often unaware of the exact amount allocated for them in the state budget while the funds are centrally managed. Following Hurricane Helene, the majority of remaining funds from that year were spent repairing affected sites in the western portion of the state, leaving the rest of the sites in North Carolina with less funding to work with. This lack of control and ambiguity concerning financial security is a substantial challenge for the site.

The second budget, which is a site-specific revenue fund, is unique to Duke Homestead and largely controlled by the site coordinator. This budget is generated from ticket sales, donations, school groups, and events. It essentially pays for all expenses not taken care of by the primary state budget. This could include special event talent, paint, picnic tables, building repairs, or living history supplies. This fund is particularly beneficial because it is protected from being used by any other site. Some sites may only have a couple hundred dollars set aside for them in their site-specific revenue funds, while others may have over \$80,000 to work with.

### *Historical Renovation/Preservation*

Duke Homestead has several structures that require immediate repair, such as the tobacco barn.

Though the process by which repairs are made can be tedious, the convenience of having their own preservation team provided by the state relieves many logistical burdens. This preservation team is financially responsible for the preservation and restoration of the site, and architectural research about the site's history is delegated entirely to them. The agency overseeing this work in North Carolina is called the State Historic Preservation Office (SHPO), a state entity that itemizes which historic preservation requirements exist and the urgency required to correct them. Another resource in the area of historical preservation that has been influential is an organization called Preservation Durham, which serves as a local entity responsible for preservation. A good relationship with the local historical preservation entity has been integral for the Homestead because it allows for more streamlined operations and easy access to expertise in local history.

### *Organizational Reflection*

One notable success was how Duke Homestead has been held to a very high standard on a consistent basis, not only by the coordinating staff, but by the community as well. The Homestead consistently brings in high quality performers and museum professionals for programming and historical preservation. Staff are well versed in topics such as material culture and historical reenactment. The interviewee described Duke Homestead as a clear example of a site that knows how to properly create demonstrations and engage in historical renovations with the authentic methods of the period. The volume of programs and events they host is substantial and diverse, catering to a number of audiences. They host 12 main events, not counting specialty tours that are held every Saturday of the month.

Several notable challenges were identified. The first and most substantial hurdle is having to maintain the high standards they set for themselves while operating with a limited number of staff. Another challenge has been updating the inventory in the museum. Though many artifacts are provided by the state agency, Duke Homestead's exhibitions remain largely unchanged. This means that guests who have visited once will be walking through the same museum upon their return.

Another challenge is the overall nature of operating a site under the Division of State Historic Sites and Properties, a part of North Carolina's state government. More specifically, it requires additional layers of bureaucracy and compliance. Extra reporting, as well as workflows of approvals for purchasing/decision-making, makes it difficult to become a more dynamic site responsive to new trends and emerging needs. The reconciliation processes, particularly relating to budgeting and financial reporting, are time-consuming and complicated at times. They require a high level of accuracy and coordination.

The last challenge mentioned was the maintenance of the structures themselves, as high expectations of quality and historical accuracy require a specific chronology of repairs based on the severity of damages. Additionally, purchasing and contracting requirements for historical preservation can be difficult due to layers of regulations.

### *Recommendations for the Octagon House*

Duke Homestead's site manager provided several recommendations for the Octagon House to consider in their strategic planning. Their chief recommendation was for the board and administrators to take the time to fully consider the amount of work that needs to be done before taking into account events and programming. This was advised to ensure a cohesive identity is intentionally established, and that unity in messaging/marketing can take place organically. Additionally, it allows for the foundation of the space to be established before straining additional resources. Before factoring in visitor-generated revenue, it is important to already have a preliminary strategy for how to keep the doors open

financially. The assumption that revenue from visitors will sustain the site's existence is not feasible in their experience. Understanding the full workload required and being methodical in goal setting allows for more sustainable long-term planning.

Duke Homestead also recommended identifying what the relevance of the different communities is to the Octagon House at the early stages of their organizational development, whether it be architectural interest groups, historical preservationists, Civil War/Revolutionary War enthusiasts, fans of paranormal attractions, etc. This helps inform what kind of programming makes sense for the Octagon House, as well as what its identity will be in the greater tourism landscape. Consistent communication with these groups is essential as well, and it should take place beyond events alone and aim to remind visitors they are welcome to visit on a daily basis, not only for special events. This is a common challenge for historic sites, as the public is often unaware that they are welcome to visit during regular business hours. The foundation must critically ask itself, "Why are people visiting our museum?" Learning about history is just one of a greater number of reasons why people will visit the Octagon House. It is also recommended to have dynamic exhibits that attract returning visitors, as well as intentionally marketing the Octagon House as a repeat destination.

When selecting site managers and administrators, Duke Homestead recommended the organization prioritize a diverse team with numerous areas of expertise. Ideally, this would include individuals with strengths in history and interpretation, an events expert, a financial specialist, and other complementary skill sets.

Another principal recommendation is to create enduring partnerships with the school systems in the region. This is an effective first step in developing educational programming. Additionally, it provides an outlet to bring in visitors quickly, efficiently, and sustainably. Being an efficient way to spread the word about the site, this also allows for a diverse demographic of elementary school, middle school, high school, and college students to familiarize themselves with the opportunities presented by the Octagon House and their potential involvement in its growth.

In terms of educational programming, looking at the Virginia SOLs to see how programming can align with the standards of learning in the community is advised. Contacting local educators and inviting them to collaborate on programming is another effective way to engage in community outreach. Physical education programs are needed statewide in Virginia, so considering that angle is another recommendation.

## Case Profile 2: Reynolds Homestead

### *Name of Organization*

Reynolds Homestead

### *Organization Contact Name*

Julie Walters Steele, Director

### *Location*

Critz, Virginia

### *Year Founded*

1970

### *Organizational Structure*

Reynolds Homestead is a registered 501(c)(3) and is a part of the Virginia Tech Foundation.

### *Number of Paid Staff*

Reynolds Homestead currently has four full-time employees. These roles consist of a director, community engagement/outreach coordinator, educational program coordinator, and human resources person.

The site has four part-time employees. This includes a project manager, maintenance technician, docent, and historic house manager. Three of these employees work for 10 hours per week, and the other works for 20 hours per week.

### *Role of Volunteers*

Reynolds Homestead relies on several volunteers both for daily operations and special events. In order to recruit volunteers, the director hosts a monthly luncheon open to the community for volunteers to sign-up for various opportunities to support the site. Given the dynamic nature of their programming, the type of need for volunteers frequently changes. This monthly gathering provides a unique and effective opportunity to manage this, as it allows volunteers to sign up for the events they are most interested and qualified to assist with on a month-to-month basis. Approximately 12-15 volunteers come to the luncheon monthly to assess what types of programs are upcoming. Most of the individuals engaging with volunteer programs are older women, with several men willing to participate as well. For larger events, Reynolds Homestead has an online sign-up form that is particularly beneficial in connecting the site with younger volunteers willing to contribute.

### *Description of the Board*

Reynolds Homestead has an advisory board with eighteen members. Three are members of the Reynolds family from the tobacco industrial lineage, three are members of the Reynolds family from the aluminum industrial lineage, three are community members, three are from Virginia Tech, three are appointees from the foundation, and three are descendants of the enslaved laborers that resided on the Reynolds property. Often there are invited guests who are asked to come and participate in the site's program development and decision-making. These guests may include faculty members from Virginia Tech or leadership from the Virginia Tech Foundation. Board members serve three-year terms that may be renewed an unlimited number of times if the individual is a descendant. If a member of the

board is not a descendant, as they may renew their membership a maximum of three times. This decision to limit the amount of term renewals for those who are not descendants is beneficial, not only to allow for the introduction of fresh perspectives, but also to provide new opportunities for community representation.

It is essential to have active engagement of the board, as well as ways to ensure board membership is regularly reinvigorated. Of the current members, descendants seem to be the group that has remained the most consistently active. The board has two representatives who are younger and show a sincere interest in carrying on the legacy of the Reynolds family. This active participation by a younger generation of descendants is encouraging, as the staff hopes to sustain participation of those who are a direct part of the history being interpreted there.

### *History of the Organization and Site*

The main Greek Revival-style house was built in 1843 by Hardin Reynolds, Abram Reynolds' son. The site had 88 enslaved individuals working on the property in the late 1800s. A cemetery for the enslaved is still existing on the site. R.J. Reynolds, founder of R.J. Reynolds Tobacco Company, was born there in 1850. The site was restored by Hardin's granddaughter, Nancy Susan Reynolds, in the late 1960s, and she deeded the homestead to Virginia Tech.

### *Lives of Enslaved People*

As mentioned previously, by the 1860s, Reynolds Homestead had 88 enslaved men, women, and children on the property. This was one of the largest enslaved populations in Patrick County, Virginia. The enslaved worked predominantly in tobacco farming and domestic service.

Those enslaved on the property resided in log cabins located on the property. None of these original structures still exist, but ongoing archaeological research has been conducted to learn more about these individuals and their lives. Though there is a cemetery for the enslaved that exists on the property, the majority of the graves are marked only with fieldstones that have no listed names.

Kitty Reynolds is one of the enslaved individuals who Reynolds Homestead has been able to uncover more about in recent years. Research conducted at the center, as well as oral histories shared by descendants of Kitty Reynolds, have provided more interesting insights into who she was and what her life looked like at Reynolds Homestead. It is recorded that she lived near the site during the post-emancipation period.

### *Activities and Programming*

Reynolds Homestead's programming covers several different categories. "Soft recreational" activities include enjoying nature as visitors explore the property and its surviving structures. Additionally, hikes are hosted on Wednesdays for those interested in participating. The site includes a self-guided Link Education About Forests (LEAF) Trail, which provides a one-mile interpretive forest tour in and around the property. The trail provides various signage detailing the area's history for people to engage with as they follow the self-guided pathway. The Homestead is embedded within an 800-acre agricultural research and extension center (AREC) focused on forest resources research called the Reynolds Homestead Forest Resources Research Center.<sup>15</sup>

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<sup>15</sup> Reynolds Homestead Forest Resources Research Center. <https://www.arec.vaes.vt.edu/arec/reynolds-homestead.html>

One unique recreational program hosted by the site is the Reynolds Homestead Challenge Course. Originally designed as an Eagle Scout project, this program is a customizable experiential learning course that is designed to unite groups, build trust, and instill leadership skills. Teams coming from a number of backgrounds participate in the low ropes adventure course to foster active communication, capitalize on each other's strengths, and connect with one another.

In terms of historical programming, historic tours of Reynolds Homestead are open mid-April through October on Sundays from 1-4 p.m. Group reservations and special tours are available in addition to the standard tours. In December, Reynolds Homestead hosts a Victorian Christmas Open House, which is a free seasonal event with holiday festivities, period-costumed guided tours, and access to the indoor home and outdoor kitchen.

Educational programming is another pillar of the Reynolds Homestead's visitation overall. The site hosts a number of field trips from surrounding school systems, and it provides educational programming specific to K-12 outreach. Several camps take place over the summer, all of which are day-camps. This programming covers a number of areas of interest not limited to history alone. The camps are centered around topics such as Science, Technology, Engineering, Math (STEM), the arts, and ancient cultures. The cost for these camps is around \$60 per child, with various support options and scholarship opportunities available.

Education based programming delivers the greatest impact for Reynolds Homestead. They have several programs designed for college students to familiarize them with the unique higher education opportunities available to them. They host several students on college tours, aid in career exploration, and provide a Leadership Patrick County program. Additionally, they are directly involved with the region's College for Older Adults (COA).

### *Event Venue/Special Events*

Reynolds Homestead has cultivated a strong network of cultural programming that has created a mutually beneficial relationship between its center and the surrounding community. Several clubs and exchanges consistently take place on the site, including their Homestead Weaver's Exchange, their Hiking at the Homestead program, Hook-in-Hand Exchange, and their Photography Club. By opening the space for collective use, meaningful connection with locals has been established in a sustainable manner.

The Bushels & Barrels Local Food, Wine, and Beer Festival held at Reynolds Homestead is one of their largest gatherings of the year. Hosted in June, this two-day event celebrates local tourism and food in the region. With a concert, Farm-to-Table dinner, and more, this is their signature event of the year and provides its most substantial turnout.

### *Organizational Growth*

As Reynolds Homestead has grown, they have tried to remain focused on being community centered. The board and leadership aspire that Reynolds Homestead serves as a valuable resource specifically interested in the needs of the region. The Homestead has actively contributed to the area's historic preservation and economic development efforts.

Programming has evolved over time as the needs of the community have changed. A prime example of this is demonstrated in the Alpha-gal tick-borne illness educational programs they hosted in collaboration with Virginia Tech and the New College Institute several years ago. At the time,

community members in Patrick County were experiencing significant impacts from the emergence of Alpha-gal syndrome. In response, Reynolds Homestead co-hosted the Alpha-gal Symposium to educate individuals about the science behind the syndrome, tick-bite prevention, the management of the syndrome and its derived symptoms, and beneficial lifestyle adaptations following contraction of the disease. They additionally invited various medical professionals to come to the event to learn more about it and how it may be treated.

### *Key Partners and Funders*

Virginia Tech is one of the key partners of the Reynolds Homestead, as mentioned previously. The Patrick County Board of Supervisors is an additional partner, as the directors take time to meet with the center's leadership. Several other partners include the Patrick County Chamber of Commerce, county administrators, and various tourism and economic development organizations.

Reynolds Homestead's key funders come from a variety of places. The Nancy Susan Reynolds Endowment is one of their largest contributors. Virginia Tech is another contributor, along with Clark Gas and Oil. Reynolds Homestead also relies on grants from the Appalachian Regional Commission and the Tobacco Commission for certain funding needs. Several descendants, including Richard S. Reynolds and Virginia S. Reynolds, have their own respective foundations that contribute financially to the site. Together they pledged \$800,000 for a community kitchen that is to be built in the future. Lastly, their annual fundraising campaign brings in significant private donations, and their administration is planning on working to grow this type of outreach to a greater capacity in the coming years.

### *Competitors and Market*

When asked how they were connected to other regional development and tourism organizations, Reynolds Homestead mentioned their efforts to become more connected to visitor centers and sites in the region. Reynolds Homestead helps to generate a significant amount of tourism in the area, and they have been seeing various weekend packages being circulated to promote overnight stays in the area. The site has worked with Air's Shift Workshop program<sup>16</sup> to expand this. Along with this, Patrick County has been trying to expand their recreational tourism through the employment of artistic initiatives, one of which is the Trail Hands Project, which includes painted concrete sculptures of hands created by local artists placed along the New River Trail. There is a similar project taking place in the area where community members are creating barn quilts and placing them along the trail route. The Rise and Shine Market, a market where selected artists and producers in the region exhibit and sell their creations, is another initiative supported by the site. Reynolds Homestead collaborates in promoting these local artisans and their efforts, as it helps to foster creativity and sustainable tourism development in their region.

There is an informal tourism collective that exists to help promote one another in Patrick County. When asked more about the nature of this collective, Reynolds Homestead mentioned a partnership with the Virginia Tech Institute for Policy and Governance that led to a community visioning meeting where participants identified the need for a more clearly defined tourism initiative. Through ongoing partnerships and dialogue, a great deal of trust has been established between Reynolds Homestead and the school system, county government, and teachers in the community. This is in consideration of the fifty years the site has existed and connected area stakeholders with university and external resources.

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<sup>16</sup> Shift Workshop. (2025). *Air Collaborative*. [https://aircollaborative.org/avada\\_portfolio/shift-workshop/](https://aircollaborative.org/avada_portfolio/shift-workshop/)

### *Financial Snapshot*

Reynolds Homestead's largest source of funding comes from the Nancy Susan Reynolds and Pat Sewell endowments. This revenue source both helps to fund program development and create provisions for funding the four full time employees' salaries. The university covers 83% of the director's salary, while the remainder is covered by the endowments. Funding support for the three part-time employees on the site is generated internally by means of fundraising. Virginia Tech provides \$14,147 annually for operations, which does not cover all necessary funding for utilities. Seeing that the site is a historic landmark, special consideration must be made in terms of these types of expenses.

The site's largest expenses include salaries, utilities, and supplies and contracted labor, such as law and facilities maintenance. Salaries and staffing expenses are the largest of these. Their biggest concern regarding funding is the sustainability of their free and low-cost programming. At their annual staff retreat that takes place in August, the organization plans to discuss the possibility of including an expected revenue in their profit/loss planning, which could be increasing in the near future for several of their annual programs.

### *Organizational Reflection*

When asked to provide an organizational reflection, Reynolds Homestead mentioned how fortunate they were that Virginia Tech is charged with providing maintenance of the historic buildings; however, these provisions come with bureaucratic challenges. For example, all expenditures must be approved by the historic facilities committee, and this process takes years to receive final approval for maintenance that is often time sensitive. Many of these needs do not allow for the luxury of waiting that amount of time, so repair needs may become exacerbated beyond one's control. For example, the oldest building on the property, the log granary, is in critical structural condition. This was noted in a Conversation Assessment that was completed in 2011. Despite its critical condition, nothing has been done by Virginia Tech facilities to repair the property. In contrast, Virginia Tech facilities recently provided major renovations to the historic home and other outbuildings in 2024. These repairs included fixing the roof of the front porch of the historic home, restoring the capitals on the columns that had deteriorated, and mitigating leaks around the chimneys and masonry on the brick structures.

### *Future Planning*

Currently, Reynolds Homestead is working towards the construction of a community and agri-business incubator kitchen. Two of the Reynolds family foundations donated \$400,000 each for the provision of the site. This endeavor further supports the site's mission to expand community service and engagement in the region.

### *Recommendations for the Octagon House*

Reynolds Homestead provided several recommendations for the Octagon House. The first recommendation was to hold community input sessions with the region's residents, nonprofit organizations, private foundations, schools, governments, and businesses in order to gather ideas for programming. In addition, this gathering would provide a useful opportunity to market upcoming events and learn more about what the identity of the Octagon House is going to be within the greater tourism landscape. Several Virginia Tech resources were recommended to facilitate these sessions including the Community Design Assistance Center (CDAC) and the Institute for Policy and Governance's Community Change Collaborative. These groups recently facilitated a community design and visioning process for a Critz community center project, generating valuable ideas informed by local residents.

Reynolds Homestead additionally emphasized collaboration as the key to success of historic landmarks.

This has been evident in the partnerships sustained by Reynolds Homestead. The site often allows a variety of businesses and nonprofits the opportunity to use their facilities free of charge. In exchange, these organizations often offer free programs on topics within their area of expertise that are timely for residents in their area of service. These mutual partnerships are recommended for the Octagon House, as they both advance community engagement and promote a ready exchange of ideas and experiences.

## Case Profile 3: Abingdon Muster Grounds

### *Name of Organization*

Abingdon Muster Grounds

### *Organization Contact Name*

Gabe Cristofari, Planner/GIS Specialist, Town of Abingdon, VA

### *Location*

Abingdon, Virginia

### *Year Founded*

The Abingdon Muster Grounds was originally founded in 1780. The landmark was designated as a National Parks Service Partner Site in September 1980, and it was officially recognized as the western/northern trailhead of the Overmountain Victory National Historic Trail via congressional legislation and presidential signing at this time.

### *Organizational Structure*

The Abingdon Muster Grounds is owned and maintained by the Town of Abingdon. The town's staff is responsible for its operations, as well as the many volunteers who contribute to the site on a regular basis. The site is affiliated with the National Trails System as a National Parks Service Partner Site. Additionally, the Virginia Department of Historic Resources (DHR) is the State Historic Preservation Office (SHPO) of Virginia, and anything the Town of Abingdon seeks to pursue in regard to the Muster Grounds must go through their approval process. In addition, there is an interpretive site on the grounds called the Keller Interpretive Center, and it coordinates the interpretive events that take place there. Volunteers at the site are also based inside of this center.

### *Number of Paid Staff*

The staff at the Abingdon Muster Grounds is limited to the Town of Abingdon's capacity, and their responsibilities are not exclusive to this site. While Gabe Cristofari is the lead on the project, he also serves as a Planner/GIS Specialist for the Town of Abingdon.

As mentioned previously, employees are paid through the Town of Abingdon's budget and financial processes. Gabe Cristofari, the lead on the project, is primarily responsible for the preservation side of the site's operations. The Town Manager of Abingdon, Mike Cochran, also contributes in various capacities. Isaiah Thomas, who serves as the Economic Development Specialist for the Town of Abingdon, contributes to the Abingdon Muster Grounds' operations and helps with their financial planning. Another contributor to the site's strategic plan is Adam Bolt, who serves as Abingdon's Tourism Coordinator. He was responsible for the plan of action to approach the town for the enhancement of the site that is under development from 2025-2026. Currently they are still in the phase of developing their own operational plan, in addition to identifying what the present need is at this phase. Official delegation of organizational leadership has yet to be determined, so this staffing structure makes up the paid operations of the site at this time.

### *Roles of Volunteers*

The Abingdon Muster Grounds has volunteers on site to welcome anyone who seeks information about the site outside of the self-guided resources provided. They additionally provide historical interpretation of the site which takes place at the Keller Interpretive Center. There are two more volunteers who are

working to expand the interpretive programming. These volunteers do historical interpretations of the various daily practices and routines carried out by historic figures from the Revolutionary War era.

### *History of the Organization and Site*

The Abingdon Muster Grounds shares the broader region's rich roots in the Revolutionary War era. Most notably, the site served as the assembly point of the Overmountain Men, a group of frontiersmen from present-day Virginia, Tennessee, and North Carolina. In September 1780, these men mustered, or gathered, at this location prior to marching over the Appalachian Mountains to confront British forces. Their journey culminated in the Battle of King's Mountain on October 7th, 1780, a pivotal Patriot victory that marked the turning point of the war in the South. This is why the site is officially recognized as the western/northern trailhead of the Overmountain Victory National Historic Trail.

Following this historic event, the site served as a gathering place for many community events for generations to come. It ultimately serves as a symbol of grassroots military mobilization during the Revolutionary War, and it continues to be a significant gathering place for public history events and commemorative events.

Though the site has Native American history, as well as a history of enslavement and free Black men who served there during the Revolutionary War, the additional background supporting this information is limited.

### *Activities and Programming*

The majority of programming currently taking place at the Abingdon Muster Grounds is based around historical interpretations. The Keller Interpretive Center is responsible for the organization of these events. Additionally, interpretive signage about Revolutionary War history is strategically placed around the property to allow for self-guided tours. This is a popular option for the school systems to utilize, as well as living history events. There are a number of patriotic and heritage celebrations that take place at the site, and following the renovation of the Keller House located on the grounds, the administration plans to broaden this type of programming even further.

Given the site's current stage of development, the activities common to the Muster Grounds are largely recreational. The site's picnic area, walking trails, open green spaces, benches, and shaded areas provide ample opportunities for community members to enjoy the outdoors. In addition, a walking path connecting the Abingdon Muster Grounds to historic downtown has been established, and it is frequently taken advantage of by the community to get a better sense of the local history that exists there.

### *Event Venue/Special Events*

The Abingdon Muster Grounds hosts an annual Overmountain Victory March Reenactment. This is to commemorate the 1780 march of the Overmountain Men during the Revolutionary War. The route from the Abingdon Muster Grounds to Kings Mountain, North Carolina is retraced by participants to remember the original trek and the sacrifices of the brave individuals who endeavored it. Speeches, historical interpretations, music, storytelling, and other activities take place, and a number of field trips are hosted on this day as well. This event serves as a cultural tradition in the region, as well as a unique opportunity for educational outreach in Washington County and beyond.

Outside of this event, there is a limited number of formal gatherings organized at the site. There will occasionally be events hosted for educational purposes; however, they are planning to largely expand

these offerings following the Keller House's renovation.

### *Organizational Growth*

As mentioned previously, the Abingdon Muster Grounds is currently in a stage of early growth, as the main house on the property is in the process of being renovated and historically preserved. It currently is uninhabitable and not safe to enter the remaining structure. The administration recently issued a Request for Proposal (RFP) for a general contractor to begin construction. They are hoping to begin renovations in September 2025 and have this phase of renovations completed by May 2026.

When asked how programming had changed over time, the interviewee mentioned how programming was extremely limited given the lack of accessibility to the main house. These restrictions have limited programming to mainly educational, historically interpretive, and recreational options. School field trips have been a significant driver of visitors, as they have provided a sustainable way by which visitors may engage with the site and its historical and cultural significance. The administration has yet to determine how programming is going to change following the renovation of the house; however, they hope to see more special events scheduled. The Keller House provides a maximum occupancy of 100 people, which is ideal for small- to medium-sized events.

Potential opportunities in funding, staffing, and operations have been a crucial item on the administration's agenda as they prepare for the expansion of the site. Once open, the hope is to have the site be a location for extended programming for the Town of Abingdon. Having an additional event venue in the region is important to the town and its efforts to expand tourism sites more broadly. This is especially the case as access to the site from the town's historic Main Steet is becoming more frequently utilized. The identity of the site in the larger tourism landscape has yet to be identified given the renovations taking place, but the town is optimistic about the unique opportunity it provides to host a wide range of programming types. Ultimately, the goal is to strengthen the Muster Grounds as a valuable heritage site with which the community can engage.

### *Visitor Experience*

At this time, the house is not fully restored or open for entry, though visitors are still welcome to walk around to enjoy the site and engage with the interpretation taking place within the Keller Interpretive Center. This is the primary type of engagement taking place at the site during renovations. Following the completion of the renovation, the Keller House will include a walk-through experience showcasing the history of the three prominent families that lived in the house.

### *Key Partners and Funders*

The Abingdon Muster Grounds has several key partnerships, including but not limited to: The Town of Abingdon, the Virginia Department of Historic Resources (DHR), Mike Henningson (Historical Interpreter), and the National Parks Service. Another key partner is the Overmountain Victory Trail Association. This organization aids in updating signage and developing extended programming for the site. The Muster Grounds Committee is instrumental as well, which is a local advisory group that provides oversight, programming promotion, and preservation efforts for the Muster Grounds in collaboration with the Town of Abingdon.

Regarding funding partners, the Abingdon Muster Grounds is largely preserved by the State of Virginia. The staffing is funded by the Town of Abingdon, and these administrators seek additional funding through grant applications. The Muster Grounds was recently awarded \$356,000 from the Virginia 250 Preservation Fund Grant, and its primary purpose is to fund the reopening of the Muster Grounds as a

heritage site in the community. In addition to renovating the Keller House, the grant will be used to promote and refine recreational opportunities for visitors to host events at the site.

### *Competitors and Market*

The Abingdon Muster Grounds is closely connected to regional development and tourism because of its close association with the Town of Abingdon. With the Virginia Creeper Trail located 1.3 miles from the site, out-of-town visitors are frequenters of the Muster Grounds in addition to the trail. The extensive renovations taking place at the site may help to extend the stays of these out-of-town visitors and provide them with an additional destination to spend time visiting the Town of Abingdon. Given its history as a landmark site during the Revolutionary War, it exists as a distinct experience in the growing list of tourism attractions in the area. The goal is to market the Muster Grounds as a historic preservation standout, further contributing to the growing historical tourism opportunities unique to the region. The Town of Abingdon already has a vibrant historic district, and the goal is to extend the walking travel from the main street further down towards the Muster Grounds' location on a more frequent basis.

### *Financial Snapshot*

The Abingdon Muster Grounds' main sources of revenue are the grants awarded to them, such as the Virginia 250 grant they received earlier this year. Any additional funds come out of the Town of Abingdon's facilities and maintenance budget. Their most notable expenses at this stage of development have been decorative wood repairs and utility upgrades.

The Town of Abingdon has a designated grant writer who continues to search for additional funding opportunities. When asked about funding concerns, the interviewee stated how the site has not had an overwhelming amount of trouble procuring funding for renovations, though there is a long road ahead in regard to the construction timeline.

### *Organizational Reflection*

One notable success for the Abingdon Muster Grounds is the engagement of participants at their Annual Historic Preservation Day. This event takes place at the end of October of each year. It hosts a welcome from the Historic Preservation Review Board in Abingdon, food and refreshments, and guest speakers. The purpose of the event is to gather local community members who own local historic landmarks to educate them on the preservation of their properties. This event brings additional awareness to the Muster Grounds, as well as providing an opportunity to update community members on the progress of the site's renovation and program development. At their last gathering, the Muster Grounds opened the floor to comments and suggestions about their aspirations for the site in the coming years. It was there that the Town of Abingdon was able to see the community's strong advocacy for the restoration of the site's Keller House and surrounding recreational areas, a huge success for the organization.

### *Recommendations for the Octagon House*

The Abingdon Muster Grounds had several notable recommendations for the Octagon House. The first was in regard to historical accuracy and preservation. The Muster Grounds suggested the Octagon House be intentional in conducting thorough research about the site before architectural design begins to ensure the historical accuracy of the preservation efforts reflect the structure itself and the individuals who lived there. Oftentimes, according to the interviewee, historical restoration efforts take place in such haste that organizational leadership fails to consider the unique assets the site provides excluding the architectural style alone. By prioritizing best practices in historical restoration,

authenticity and historical accuracy is successfully accomplished. These elements are integral to the value of the experience for visitors, and they allow the site to showcase the personal stories of the family who lived in the home. It additionally ensures the sensitivity and consideration necessary to ensure all narratives are communicated, including those of enslaved laborers.

Another suggestion from the Abingdon Muster Grounds was to engage with the public through the opening of house tours during the different stages of renovation. This allows for the public to engage with the site's progress on a regular basis and create a close connection with its administration as they develop upcoming programs. The interviewee even suggested including the tours as an element of broader tourism initiatives, such as the Virginia Highlands Festival. Providing consistent updates on the site's historic renovation process on social media, both with short and long form content, is additionally helpful in promoting personal investment in the site and its success throughout the region.

The final suggestion from the Abingdon Muster Grounds to the Octagon House Foundation involves an emphasis on regional connection. Their recommendation was, in conjunction with programming and the development of historical exhibits, to highlight the connections between the Thomas family and other prominent families or sites in the broader region. In other words, as the cultural identity of the Octagon House is being defined, it is important to situate the site within the broader historical narrative of the region. This initiative would not only promote the awareness of the site's significance in the greater historic landscape of Southwest Virginia, but it would also create opportunities to grow the historic tourism network by linking the stories of the families and historic landmarks in the region. This approach allows the Octagon House to gain layers of meaning with individuals as they engage with the site in the context of what they already know about their cultural heritage.

## Case Profile 4: McCormick Farms

### *Name of Organization*

McCormick Farms

### *Organization Contact Name*

Amanda Kirby, Administrative Assistant

### *Location*

Raphine, Virginia

### *Year Founded*

McCormick Farms was built in 1822 by Robert McCormick, father of famous inventor Cyrus McCormick, and was donated in 1954 to Virginia Tech.

### *Organizational Structure*

McCormick Farms is operated by Virginia Tech under the College of Agriculture and Life Sciences (CALs). The site houses over 900 acres of owned and leased land, and it is utilized by the university for research purposes. The predominant areas of research at this site include forage-based livestock systems, sheep testing, beef cattle production, rotational grazing trials, and silvopasture demonstrations. Also known as the Shenandoah Valley Agricultural Research and Extension Center (AREC), this site is one of 11 ARECs in Virginia.

### *Number of Paid Staff*

McCormick Farms has a superintendent (Gabriel Pent, Virginia Tech faculty), a part-time administrative assistant (Amanda Kirby), and 3 agricultural technicians who take care of the day-to-day business on the farm. Three are on salary and one is a wage employee, and each is paid by Virginia Tech. They work closely with the Forestry Department and the Virginia Forage and Grassland Council (VFGC). They additionally have several Virginia Tech faculty and students working on the farm and conducting research on behalf of the university. Ram testing takes place on the farms each August, and this has historically been a successful way to connect the local community with the offerings of Virginia Tech through McCormick Farms' presence in the area.

### *Roles of Volunteers*

McCormick Farms hosts a volunteer retired large animal veterinarian who works on the property. In addition, there are several Master Gardener volunteers who come to plant trees and shrubs, as well as to manage existing landscaping. They are especially helpful in clearing out loads of forest trees that have died off, and they frequently treat trees that have been blighted by disease.

McCormick Farms will occasionally host an intern who works at the site during the summer with the opportunity to continue their work into the semester. Many students want to do agricultural work before attending universities in other states in order to solidify their interest in and familiarity with agriculture. Additionally, Virginia Tech students will elect to work on the property before entering other fields, such as veterinary medicine, forestry, landscape architecture, and several others. This provides a unique opportunity for undergraduate students still engaged in career exploration to have a more hands-on experience in their prospective fields.

Typically, when McCormick Farms is in need of an emergency hire, existing volunteers will step up to

temporarily fill the role on an unpaid basis. This allows prospective employees to shadow the position in case they would be interested in fulfilling the role long-term.

### *Description of the Board*

McCormick Farms has a leadership council that meets during the spring and fall seasons. The group provides several diverse perspectives, with individuals specializing in a variety of areas of expertise including historians, professors from Virginia Tech, leaders in the farming industry, engineering specialists, and more. The leadership council recently had a promising conversation with Virginia Tech about moving forward in closer collaboration with the university. The interviewee noted how the Virginia Tech brand and affiliation to the site has played an important role in elevating the value of the farm. The staff, specifically the superintendent of the site, works closely with the leadership council to foster sustainable partnerships and engage in community outreach. Additionally, the superintendent frequently collaborates with the site's council members. He engages with everyone on a monthly basis, and several on a daily basis, as their partnerships involve collaborating on daily operations on the property.

### *History of the Organization and Site*

McCormick Farms is historically significant, as it is the birthplace of the mechanical reaper. Invented by Cyrus Hall McCormick, owner of the farm in 1831, the mechanical reaper dramatically increased agricultural productivity by allowing the farmer to harvest at a faster pace than they would have been able to otherwise. This invention was a key development in the agricultural revolution, and hence made McCormick Farms a site of international technological innovation during the 19th century. This spirit of innovation that originated at the site is carried on today, as the farm has now been transformed into an agricultural research center of an internationally-distinguished agricultural program. The McCormick family donated the farm to Virginia Tech in 1954 to serve both as a center for agricultural research as well as a memorial of Cyrus McCormick's legacy.

### *Activities and Programming*

The programming and activities at McCormick Farms are a combination of recreation, educational, interpretive, and historical programming. Research is a fundamental element of all of their programming, and the innovative research taking place there is a draw to the site's significance and value. With this in mind, the site hosts an annual Field Day where the community is invited to enjoy the site and be updated on the types of research taking place at that time.

In terms of recreation, the site has an interpretive trail that was curated by the Master Gardeners, a volunteer horticultural education group supported by the agricultural extension office. The trail is a mile long and features a variety of plant species for visitors to enjoy as they engage in soft recreational activities. To complement this, educational signage is placed along the trail so that people may participate in a self-guided tour of the gardens, as well as educate themselves on the species of plants that thrive in the region. This feature is particularly popular for young families and children hoping to familiarize themselves with nature on a more personal level. The wildflower meadows on the property are another frequently visited element of the site, as people have picnics and walk around the surrounding habitats regularly.

A major element of McCormick Farms' educational programming is their Envirothon Competition. Hosted at the site, this program is a natural resources competition for high school students. Teams are created outside of the center by a number of organizations with a minimum of five students, and it is there that they compete to test their collective knowledge of natural resources in aquatics, soil,

forestry, wildlife, and current environmental issues. The Shenandoah Valley Soil and Water Conservation District sponsors the local competition, and the winning team advances to a statewide iteration of the competition. The staff and faculty on site also offer special programming for Virginia Tech's first-generation college students, as well as local community students who have an interest in agricultural studies.

Another of McCormick Farms' most popular programs is their Research Day. Targeted towards middle school students ranging from the ages of 12-14, this program aims to familiarize younger students to the research process. Students engage in several field experiments that are frequently conducted at McCormick Farms. A popular research experiment students particularly enjoy involves venturing to the pond to test the algae in the water. Students learn to calculate different measurements such as pH, acidity, nutrient levels, and algae identification. The programming teaches students about why this testing matters, and how they are able to look at these measurements to assess different levels of contamination and pollution in the habitat. The superintendent and research technicians on the property additionally provide beginner lectures during the programming, and Virginia Tech faculty will often contribute as well, giving the students an idea of higher education and the research opportunities available.

### *Event Venue/Special Events*

Mill Day is McCormick Farms' most popular special event. Held each year on the first Saturday of October, Mill Day is designed to honor and commemorate the memory of Cyrus McCormick and his mechanical reaper. This event memorializes the anniversary of the invention itself. On this day, the property welcomes community members, as well as traveling visitors, to witness the operation of the Historic Grist Mill located on the site. This is the main attraction, as this historic mill is only utilized once a year on this day.

The farm additionally hosts short tours of the farmland on Mill Day, and they use this as an opportunity to showcase the innovative work that is still taking place on this historic farmland. Child and educational programs also take place on this day, featuring several agricultural and historical demonstrations designed to educate children about environmental science and agricultural innovation. Live music, food provided by local vendors, and period interpreters are also present at the event, bringing to life the cultural heritage of the time. This event is particularly special, as local farmers and vendors come together to honor the site's history and its identity in the broader region. Additionally, visitors of the farm who share lineage with the McCormick family are welcome to come together and identify themselves as a descendant in the site's records.

### *Organizational Growth*

The interviewee from McCormick Farms shared how she has been an employee at McCormick Farms for over thirteen years. When asked about the organizational growth of the site, Kirby noted how technology has had the greatest impact on the site, more than any other factors. Programs have developed significantly due to new technology that allows for new opportunities to market the site to different audiences. In recent years, McCormick Farms has invested in creating videos and other marketing materials that have been instrumental in elevating the site's visibility. This landmark has a unique international draw, as the mechanical reaper was revolutionary to agricultural production, not only in the United States, but internationally. Visitor logs record the substantial number of international visitors who frequent McCormick Farms; international visitation has notably grown in part due to increased digital marketing efforts. Generally, these visitors are farmers who love and appreciate the mechanical reaper and the way it dramatically altered grain production over time. The interviewee

additionally noted how this site is unique in that, though it is a historic site from the early 19<sup>th</sup> century, it still remains a site of innovation and invention, as Virginia Tech has carried on this legacy through new research endeavors.

### *Visitor Experience*

Summer and autumn are McCormick Farms' busiest months. There are numerous potential variations to the visitor experience at the site. The way people come to experience and interact with it, as well as their motivations to do so, change frequently based on the visitor's area of interest. Visitors are welcome to come to the site free of charge to walk around the property and explore the different structures. When asked to elaborate on the visitor experience at McCormick Farms, the interviewee stated:

"We have a two-acre memorial plot at the farm, and this consists of several small log cabins - one that is our grist mill, and one that is our self-guided museum. Both of these are free and open to the public and are separate from the main offices.

Our historic red brick house is also on the memorial grounds, and this is also where our VT offices are. The house is not part of the self-guided, visual/audio tour (although visitors sometimes come into the office for a look around) and is only open on a part-time basis."

McCormick Farms started a database of the site's visitors in 1994. The data collection is voluntary, and when visitors sign in, they are asked to provide details on their experience at the farm, as well as what brought them there to visit. This information is analyzed to calculate the site's annual and monthly visitation. The site averages around 1,500 visitors per year, including a total of 47,000 people in the database as of July 2025.

Local schools will often set aside dates for students to visit McCormick Farms. These groups come from a range of age groups. The site provides a unique opportunity for historical and educational programming for students, as well as several free-range recreational activities. Occasionally, schools will show up without notice, which is acceptable as long as staff on site have an opportunity to get a head count of how many students visited the site that day. Preplanned visits by school systems are preferred, as the site likes to use the visit as an opportunity to contribute to their database and learn more about their visitation. In the event of unexpected school visits, the site recommended the Octagon House take the time to calculate total attendance, as well as identify what age groups were present. This initiative to document visitation has proven beneficial to McCormick Farms over time for a number of reasons, but most notably in their strategic planning and general operations.

On occasion, visitors will request the chance to explore the office located on the property. This space served as the original home of Robert McCormick and his son, Cyrus, and there is a great deal of organic interest in restoring the home to its original nineteenth century charm. Currently, the structure has been renovated several times and is utilized solely as private office space for the center. Talks of restoring the home and making it available to visitors have been in the works; however, no definitive efforts have been initiated. Several original elements of the interior are still visible, and there is no shortage of potential, according to the interviewee.

### *Key Partners and Funders*

McCormick Farms has several key partners. Virginia Tech College of Agriculture and Life Sciences, Virginia Agriculture Experiment Station, Virginia Cooperative Extension, Virginia State University,

Forestry Department, and the Virginia Forage and Grassland Council are several that work closely with the site on a regular basis. Additionally, seeing that several of the 900 acres of the farms are leased, local farmers and neighboring farms are major partners to the site. Frequent collaboration with community members is essential to the farms' operations, as well as its outreach initiatives. Coordination with local historic agencies and descendants of the McCormick family is also essential, as they ensure the McCormick legacy is preserved and narrated in a respectful and meaningful way. The primary funder of the site is Virginia Tech, as it is responsible for paying staff and creating/preserving the research infrastructure that takes place there. Although the visitor experience at McCormick Farms is free of charge, donation boxes are placed around the site for voluntary collection. The average income from museum box donations is approximately \$580 per year.

### *Competitors and Market*

The pricing structure at McCormick Farms is completely free. Donation boxes are the only means by which the farm collects revenue. A noteworthy portion of their inflow of visitors comes from out-of-town, as the history of the mechanical reaper generates significant interest among the agricultural community at large. Local community members often bring these out-of-town visitors for visits on a regular basis; however, in recent years many out-of-town visitors have discovered the site on their own accord, via digital marketing or because of Virginia Tech.

There are several neighboring attractions that visitors choose to explore in addition to McCormick Farms. The site is in consistent contact and collaboration with the Staunton Visitors Center and the Lexington Visitors Center. The opportunity to market the site at these landmarks brings in lots of traffic from the neighboring roadways and Interstate 81. Signage is placed strategically on the highway to promote awareness of McCormick Farms and provide directions.

Often visitors will visit the site to witness the mill located on the property in operation, not knowing that the mill itself is only operational during their annual Mill Day event in October. With this in mind, the site often redirects visitors to a neighboring mill that is operational and welcomes visitors; these two sites have a mutually beneficial partnership by promoting the other's complementary offerings.

Agricultural and industrial history, especially in the Shenandoah Valley, is popular with the surrounding communities, and tourism sites coexist with a great deal of collaboration in order to celebrate this history. The Frontier Culture Museum in Staunton, Virginia is an example of one of these close collaborators, and McCormick Farms works with them often to market programming and spread awareness. Many of the museum's patrons have an interest in the equipment the McCormick family invented on the site, so people often will make McCormick Farms their next destination. Promoting longer lodging stays in the region, as well as fostering a network of allied tourism experiences is important both in boosting the area's economy and strengthening local partnerships.

### *Financial Snapshot*

The predominant funding sources at McCormick Farms come from awarded grants. Donations are the second most substantial source, and these are awarded once or twice a year into their fund through the Virginia Tech Foundation.

### *Organizational Reflection*

One notable success of McCormick Farms is their sustained partnership with the Forestry Department, Virginia Cooperative Extension, and local community farmers who support their operations. The interviewee noted the accomplished leadership council they have for the farm, which has been made up

of local farmers who have worked in the region for decades.

The most notable challenge for McCormick Farms to date has been the COVID-19 pandemic. Halting operations at the physical location was a difficult adjustment. Finding people to participate remotely in their programs, like many historic landmarks, was a learning curve at the beginning. On the other hand, staff adapted to online programming, which created a novel opportunity to engage with technology in ways they otherwise wouldn't have.

Another notable challenge for McCormick Farms has been their ongoing issues with weather. Not only does the farm itself require good weather for research, but the programming that takes place at the historic sites on the property additionally requires optimal weather conditions. Interruptions due to weather can strain the regularly scheduled activities taking place at the site, and it has been a process learning to adapt to these ever-changing factors. Weather-related issues impact the cattle residing on the farm, as well as haymakers who are scheduled to work on specific days and times. Trying to navigate around them requires a dynamic team, flexibility, and creativity, according to the interviewee. When asked what special considerations for historic renovation work needed to be emphasized, this was the main focus, as weather can introduce delays in an already time-sensitive renovation process.

### *Future Planning*

2025 marks the 50th year of ram sales at McCormick Farms. This milestone is significant to the farms and has been one of the focal points in the site's future planning as they celebrate this accomplishment in the community. Every year, in collaboration with Virginia Tech's agricultural researchers, the site hosts an event where livestock is evaluated, appraised, and sold to community members and visitors. The top-performing livestock are sold to breeders, and it is an exceptional opportunity to demonstrate to the community how Virginia Tech and McCormick Farms is able to serve the region in a unique and sustainable way.

In addition, this year marks the 194th anniversary of the patenting of the mechanical reaper by Cyrus McCormick. As the site approaches the 200th anniversary, Mill Day planning and preparation will be a top priority in their strategic planning. More details related to the site's future planning can be found in their 2020-2025 strategic plan located in the appendix of this report.

### *Recommendations for the Octagon House*

When asked for recommendations for the Octagon House, based on the experiences of professionals at McCormick Farms, the site recommended establishing a sincere connection between the Octagon House as a historic site and the local community, especially those who have a genealogical connection with the Thomas family. McCormick Farms has a large network of descendants who share a personal interest in their connection to the farm and the family that built it. Creating an innovative way to establish this network and promote engagement with these groups of individuals can help to raise awareness of the historic site and its significance in the region. In parallel, the interviewee recommends creating a database where descendants can share family heirlooms and genealogical information to connect with relatives and to support the Octagon House in its curation efforts.

McCormick Farms also encouraged the Octagon House to create annual, local events the community will anticipate and look forward to yearly. One idea that was shared was the prospect of celebrating Octagon Day. This could be a day of wide-reaching program on the 8th day of the 8th month each year. Proceeds could go towards the Octagon House Foundation for continued programming and preservation of the historic property.

The final recommendation from McCormick Farms to the Octagon House was to keep in mind the notion that everyone loves a story. Shying away from emphasizing the history of the individuals that lived at the house can be a mistake, as the personification of these historic figures is a key element to the overall value of the Octagon House. Emphasizing the historic narrative of the property is key to a memorable experience at a historic site, and it bridges the gap between the history books and the real lived testimonies of the family that made the site what it truly is today.

## Case Profile 5: Burwell School Historic Site

### *Name of Organization*

Burwell School Historic Site

### *Organization Contact Name*

Emma Vadney, Site Coordinator

### *Location*

Hillsborough, North Carolina

### *Year Founded*

The Burwell residence was built around 1821 with alterations made to the site in 1848. From 1837-1857, the site served as a school for young girls. The property was converted into a historic site in the 1960s, and it has been regularly open for public visitation for the last fifteen years.

### *Number of Paid Staff*

Burwell School Historic Site has three paid staff members. These positions include a site coordinator (30 hrs./week), visitor services coordinator (25 hrs./week), and a finance director (15 hrs./week). Before the interviewee was hired as the full-time site coordinator, all employees at Burwell School were hired on a part-time basis. In addition to these paid staff members, the site has four docents who are responsible for coordinating guided tours, as well as many volunteers who contribute regularly to operations.

### *Organizational Structure*

Burwell School Historic Site is owned and operated by the Historic Hillsborough Commission, which is the site's official legal name as a 501(c)(3) nonprofit. The commission was created by an act of the North Carolina General Assembly in the 1960s. This motion requires members of the site's board to be appointed by the Governor of North Carolina. The lead operator within the site's staff is the site coordinator, and this individual is responsible for a variety of tasks. The most important of these include overseeing staffing and operations, coordinating programs and special events, fundraising, grant seeking and administration, and general site management. Not only is this role ever-changing, it requires knowledge in a variety of areas. When discussing the interviewee's experience fulfilling this role, she emphasized the importance of a dynamic attitude, as the fast-paced expectations of the role require both critical thinking skills and creative problem-solving abilities.

### *Roles of Volunteers*

In addition to the commissioners on site, there are around 15 additional volunteers who serve in similar roles as those mentioned previously. Several of these are connected to local organizations outside the Burwell School, such as the Hillsborough Garden Club. The four volunteer docents at the site serve around two shifts per month, and they provide the free guided tours offered consistently on the grounds of the property. The interviewee noted how recruiting non-commissioner volunteers can be difficult, as the site is open during regular business hours and conflicts with potential volunteers' work and school schedules. In addition, they emphasized how this challenge to recruit outside volunteers largely speaks to the value of paid staff members and their willingness to commit to the Burwell School's success.

### *Brief Description of the Board*

As referenced earlier, the Burwell School Historic Site is governed by the Historic Hillsborough Commission, which was created in the 1960s by the North Carolina General Assembly. Board members are appointed by the governor of North Carolina, and the commission operates as a 501(c)(3) nonprofit. There are 25 total commissioners who serve six-year terms, and each can be appointed for two consecutive terms.

The 25 board members/commissioners of the Historic Hillsborough Commission fulfill the majority of responsibilities related to volunteer work at the Burwell School. These responsibilities can range from a variety of areas such as landscaping, gardening, maintenance, event planning and support, and serving as greeters. The commission is largely characterized as a “working board,” and their ability to be involved with the site’s operations at such a close capacity largely contributes to the site’s success.

There are several available offices within the commission such as chair, vice chair, treasurer, and secretary. Each commissioner is tasked with serving on two different committees of their choice, and each encompasses a different area of interest. Commissioners are encouraged to choose the committee they have the most expertise in, such as research, construction and grounds, finance, events, fundraising, and a specific committee tasked with planning the site’s annual fundraising gala. The structure is flexible, and committee topics are subject to change over time; however, this is the current accepted organization. Board members come from many backgrounds. History enthusiasts, genealogists, long-time residents, and business owners are just a few examples. One current board member is a descendant of a free Black laborer who was employed at the site during the time of operation as the Burwell School. In the coming years, the administration hopes to expand the opportunities to serve on the commission to individuals in more diverse fields.

### *Historical Significance*

The Burwell School Historic Site was originally built in 1821 by Captain John Berry. In 1835 the property was passed on to the trustees of the Presbyterian Church to serve as a parsonage for their new pastor, Reverend Robert Burwell, and his family. In 1837 the Burwell family established the Burwell Academy for Young Ladies, a progressive school for young women to receive an education at a time when formal education for women was limited. The family operated the school until 1857.

The house is additionally known for its history of enslavement, as it was the site where Elizabeth Keckley resided during the mid-nineteenth century. Elizabeth Keckley was an enslaved woman who became renowned for being the dressmaker and close friend of Mary Todd Lincoln. Keckley wrote and published her autobiography, *Behind the Scenes, also known as, Thirty Years a Slave and Four Years in the White House* in 1868. Following the 1850s the site became a private residence up until the 1960s when it officially became a historic landmark open to the public.

### *Activities and Programming*

At Burwell School Historic Site, self-guided tours take place on weekdays with laminated interpretive cards in each of the rooms. In addition to self-guided tours, guided tours are given by docents on the weekends free of charge. Scheduled group tours are also available, which cost \$10 per person. These special group tours are particularly popular with school groups, Girl Scouts, and book clubs.

There are several other structures on the property that are open to the public upon request. This includes the brick schoolhouse that was recently restored and an original brick outhouse located on the property. Access to the outdoor space is free and available from dawn to dusk for independent

exploring.

Regarding programming, lectures and talks hosted by the Burwell School are given by community members as an effective way to attract visitors. Often there are 20-30 attendees who come to listen to these guided conversations, and a variety of subjects are covered based on who in the community has research or expertise they would like to share. Additionally, book readings and poetry readings, including from North Carolina's Poet Laureate, are a notable draw to the site.

The site's specialized programming is limited, though they strongly believe in using programming as a means to communicate both the history of the site as well as related local history. The Burwell School hosts an annual Fall Festival each September, and a Holiday Open House with refreshments in December.

The site has seen a great deal of success in partnering with the community to make the space available for a variety of organizations. Hosting outside groups for programs, such as North Carolina State University's DNA and African American history project, is one of many examples how the site has been used to enrich the community and provide a common gathering place.

### *Organizational Growth*

When the site was originally purchased by the Historic Hillsborough Commission in the 1960s, Burwell School was furnished as a period home with the intention of using it solely as an event space. This would be for smaller gatherings such as high tea and other events that were doable with a limited number of participants. It has only been in the last 10-15 years that the site has transformed into a museum. It has also been within this last decade that the site has spearheaded the programs it is known for today and remained open for visitation on a regular basis.

These developments have largely been attributed to the introduction of paid staff. The growth in staffing levels due to additional funding has allowed for the creation of much needed roles, such as site coordinator and finance director. Expanding hours and programming was made possible by the introduction of these paid roles, as there is a level of responsibility from said positions that permits the extra effort needed in order to make these expansions a reality. According to the interviewee, having staff has been "life-changing" as it has increased visitor numbers, enabled more programming, and raised the site's overall recognition in the region.

In terms of visitation numbers, Burwell School has surpassed 3,000 visitors in a year. This is largely attributed to the growth in staff, as well as the community seeing the site as a more substantial operation due to the operation of the site during regular business hours. Programmatic expansion has also taken place within the last decade, while still honoring the site's original intention to remain an available gathering space for programs outside of the Burwell School's history alone. This has drawn in new audiences and allowed for a greater reach in the area.

Fundraising efforts, namely their annual gala, have become highly successful, as the site saw \$30,000 in net profit in a recent year. This feat was largely attributed to the continued support of private donors and the strong relationships that have been prioritized between donors and the Burwell School Historic Site. They additionally host an annual giving campaign to sustain operations, which had a goal this past year of \$34,000. This gala is a major undertaking, and planning is conducted by a dedicated board committee, which relies on community and donor contributions to provide auction items that are bid on for the benefit of the site's fundraising campaign.

### *Key Partners and Funders*

The Burwell School Historic Site has several key partners and funders who contribute to the success of the site. Several notable partners include: the Hillsborough Tourism Board, the Orange County Human Services Department, the Orange County Historic Museum, the Hillsborough Arts Council, local libraries, businesses, restaurants, and auction houses. The Alliance for Historic Hillsborough is responsible for operating the local visitor center and hosting town wide programming, which makes it a great source for networking and community outreach.

The key funders of the Burwell School Historic Site are the Hillsborough Tourism Board and the Orange County Human Services Department. The Hillsborough Tourism Board is responsible for funding staffing expenses, as well as ensuring the site remains available to the public free of charge. The Orange County Human Services Department provides funding for visitor services and safety; however, due to funding cuts, this contract was recently reduced to \$10,000. As mentioned previously, staffing is the largest expense the site consistently faces. Funding from their fundraising efforts, such as their annual gala and seasonal mail-in campaigns, further allocates for staffing expenses and the site's continued growth as an organization.

### *Competitors and Market*

When asked how the Burwell School was connected to other regional development and tourism organizations, the interviewee explained how the site contracts with the Hillsborough Tourism Board to promote special events and foster a connection between the site and the larger tourism landscape. Several other groups also funded through these contracts include the Orange County Historic Museum, the Hillsborough Art Council, and the Alliance for Historic Hillsborough. The Arts Council and the Alliance for Historic Hillsborough have larger budgets than the Burwell School, and they are tasked with hosting and planning the more substantial community events.

The Burwell School Historic Site is intentional about fostering ongoing partnerships with their library, local restaurants and businesses, and a local auction house that contributes to the site's annual gala where items are auctioned off for the benefit of their fundraising budget. The interviewee mentioned how, though their role in the larger network is to promote the site itself, they are incredibly purposeful in establishing themselves as a good community partner who is supportive of the community and their efforts to collaborate.

### *Financial Snapshot*

The Burwell School Historic Site has an interesting funding structure. The site is currently primarily donation-driven, relying on the partnership of private funders and revenue generated from its funding campaigns that take place throughout the year. Operational funding is the site's greatest challenge, as there is a limited amount of grants that are available for general overhead expenses. The site makes a point to regularly seek out project-based grants both for historical preservation endeavors and funds for programmatic development.

Seeing that the Burwell School is a stand-alone historic landmark, the staff and committees that make up the organization have been proactive in creating fundraising initiatives that can sustain and grow the site. Their annual fund campaign is conducted through a seasonal mailing list that is sent out every fall and spring. The initiative was effective this past cycle as they continue to pursue their end-of-year goal of \$34,000.

The Burwell School's biggest fundraiser of the year is their auction gala that takes place every spring. This fundraiser is a huge undertaking for the organization, and it relies not only on private donations, but also donors who are willing to provide items for the auction. This requires the collaboration of local community members and businesses who are willing to donate goods and services for the bidding process. The site's most recent gala raised around \$30,000 net profit, which made it their most profitable fundraising event to date. Long-time donors who contribute to this event, as well as their annual Fall Festival in September, are crucial to the success of these fundraising campaigns. Seeing that Hillsborough is a smaller town, efforts to allocate collaboration and donations are made easier and personal connections with donors are made more feasible.

When asked about the site's top expenses, the interviewee was emphatic that staffing is the most challenging to fund. In addition, general operations, utilities, water, technology, and HVAC costs are common expenses encountered by the site coordinator. Seeing that the Burwell School is a historic architectural landmark, maintenance is a variable expense.

### *Organizational Reflection*

When asked to share notable successes and challenges, the interviewee shared several valuable insights about what it is like to operate a historic site. Beginning with the successes, the Burwell School recently received project-based grants to restore the brick schoolhouse located on the property. Additionally, the introduction of regularly paid staff has been transformative, as the site is able to operate during regular business hours, increase visitor numbers, expand their capacity to host events and programs, and create a stronger presence in the community.

Regarding challenges, funding instability was underlined as the most critical. The interviewee pointed out how, particularly at this moment in time, grants and private donations are unpredictable, making it difficult to finalize long-term strategic decisions. In addition, funding cuts to grants and private donations have resulted in significant reductions in contracts. Lastly, sustaining funding for staff will continue to be a difficult, though essential, task.

### *Future Planning*

When asked about future planning for the Burwell School Historic Site, the interviewee said they are prioritizing a preservation needs assessment study to identify the necessary repairs for the structure itself. From initial observations, it is apparent that a restoration of the foundation of the building, as well as a fresh paint job on the exterior of the home is needed in the near future. Securing funding for these types of repairs is a challenge, though they are hopeful that this study will be a stepping stone towards identifying potential funds.

In addition, the Burwell School hopes to continue their annual fund campaign into the end of the year, as well as continue planning for their auction gala next year. Building off the success of the previous gala is important, and they believe the momentum from the last gala and the enjoyment of participants will lead to greater attendance in the future. While sustaining the two standing grants they already acquired is important for them, the site hopes to become more creative in diversifying their incoming revenue sources.

### *Recommendations for Octagon House*

The Burwell School Historic Site presented several recommendations for the Octagon House. The first pertained to connecting with local community members who would be interested in sharing lectures and talks. Not only would this invitation allow for the introduction of new visitors to the site, but it

would also allow for a focus on exciting, fresh presentations that draw visitors to the historic significance of the Octagon House. Additionally, more grassroots program development is made possible this way, and the voices of the community and what they would like to see out of the Octagon House is communicated more clearly. Repeat visitors are also introduced through this format of events, and an expansion of overall purpose and identity is formed naturally.

In regard to operations, building a team through paid staffing is an effective way to develop a dedicated team of administrators. The distinction between paid staff members and volunteer support was highly emphasized throughout the interview, and delegating specific tasks to each staff member based on their specific area of expertise is advised. The interviewee additionally recommended prioritizing the hiring of someone who is specifically responsible for scouting grants and other creative funding opportunities on a regular basis. Being “grant-ready” is essential, with materials and strategic plans on the ready at a moment's notice. This allows for the grant applicant to apply for grants with a short-term deadline, as well as streamline the process of fundraising exploration.

Several anecdotes regarding fundraising recommendations were presented as well. More specifically, seeking out private foundations with an interest in historic preservation is strongly encouraged. In addition, establishing a strong donor base early in the process is recommended, because committed donors are essential to the sustenance of the site during its early development and longer-term. Lastly, any efforts to create special events for fundraising purposes are encouraged, such as holiday events, galas, and open houses. This is because these calendar events remind the community regularly of the site's presence.

## SWOT

A Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis helps to summarize some of the key positive and negative influences that may impact the feasibility of restoring the Octagon House property moving forward for programs and events. In the SWOT typology, the Strengths and Weaknesses focus on *internal* elements specific to the Octagon House and its operations. The Opportunities and Threats highlight *external* elements that may be outside of the organization's control but that can nonetheless impact its effectiveness and capacity. The following SWOT is based on the interviews with key stakeholders and peer case studies.

### Strengths

- The Octagon House Foundation can draw from the extensive research of Mack Sturgill to help guide historical interpretation of the site. The multifaceted history of the site, including its ties to industry, slavery, the Civil War, and unique architectural trends of the time, make for a rich tapestry of material for educational programming.
  - The Octagon House Foundation seeks to lift up the narrative of the enslaved people who labored on the property. This aspect of the site's history will further enrich local and regional interpretation of the Antebellum and Civil War eras.
- The Octagon House is already connected with several key stakeholders in the area working in tourism, economic development, education, historical research, and civil society. Increasing awareness of the project goals and proposed programming can continue through stakeholder meetings, public events, and personal connections with the board.
- The Octagon House is a well-known community landmark and there is excitement among community members to see it restored for education and other community uses. Dedicated volunteers have supported the mission of the foundation for several years, indicating commitment and passion for the vision over time.

### Weaknesses

- Limited surviving artifacts and primary source documentation may make it difficult to fill in the full history of the site and outfit it with original furnishings.
- The site currently lacks basic infrastructure such as plumbing, electricity, etc. The house will likely need ADA-accessible restrooms, an area for food preparation, climate control, and designated parking to accommodate regular visitors for events and programs.
- To build up to the proposed level of programming, the Octagon House will need paid staff; relying solely on volunteers to deliver regular, scheduled programs is inherently a limitation for program growth. Large events and weddings need dedicated event managers to ensure quality and consistency.
  - Relying exclusively on volunteers for programming is inherently a limitation to organizational growth and the ability to offer reliable programming and hours of operation. Identifying funding and revenue streams to support paid staff may be a never-ending challenge, as is volunteer recruitment.
- Detailed documentation of projected costs and revenues will be needed to refine economic impact projections and develop accurate grant proposals.
  - The Board may need to participate in a facilitated strategic planning process to more clearly define the organizational vision and timeline for development.

### Opportunities

- The Octagon House will likely benefit a variety of traveler types, including families, tourists

interested in history and architecture, Black travelers, and visitors interested in dining and lodging once those resources are developed.

- Primary points of Interest in the area such as Hungry Mother State Park and downtown Marion will draw in visitors that the Octagon House can connect with to extend their stay. The Octagon House can work with local tourism partners to develop “trip packages” that include the Octagon House in addition to a variety of activities that bring visitors to the area for a weekend or week-long stay. It will be important for the Octagon House to cross-market and cross-promote its events and programs at these primary points of interest.
- The Octagon House property would benefit from a playground and outdoor picnic area for younger visitors to have a snack and unwind, whether for school groups or children attending events with their parents such as weddings.
  - Acquiring adjacent lots will allow for room to grow to accommodate the expanded programming and additional infrastructure.
- Interactive, rotating exhibits, well-marketed annual events, and hands-on programs will attract both tourists and locals alike.
- Partnerships with educational institutions such as public schools, technical colleges, and universities will lead to further research about the site and pathways for career development in historic renovation, cultural experiences, grounds maintenance, etc.
  - These partnerships also expose students’ families to the site as a community resource and increase visitation.
- Connecting visitors to the site’s Black history allows for several opportunities, including oral history projects, interactive brick making, and networking with other historical sites in the region that have identified the fingerprints of enslaved laborers in the brickwork.
- The wedding venue market may not be fully saturated in Smyth County, creating a niche for the development of a wedding venue.
  - There is clearly a need within the community for larger event spaces in general.
- Collaboration among area museums, libraries, and cultural heritage sites should continue, ideally leading to the development of a permanent cultural institution coalition. Such a network could leverage shared resources to investigate genealogical and historical research queries to enhance programming and exhibits.
  - Volunteer lecturers and local speakers familiar with the region can enhance programming opportunities and strengthen community interest in the site.
- A private-nonprofit partnership between a contractor and the Octagon House could solicit broader support at the state level if elected officials see private investment being made in the site. One such arrangement might be a private company contracted to operate the wedding and event venue.

## Threats

- State tourism and history grants are competitive and do not always award the full amounts requested, such as the Commonwealth History Fund and Virginia 250 Humanities grants.
  - Operational costs are difficult to cover entirely with grant funding.
- Building materials and construction techniques must comply with historic renovation requirements; this can be a limiting factor regarding new or additional development and/or add costs to the restoration process.
- Several stakeholders noted the lack of a direct exit off I-81 to access the Octagon House. To remedy this, directional signage in the form of [Supplemental Guide Signs](#) on the highway and directional signage from the interstate are recommended.

- The Octagon House must establish a unique identity amidst a regional landscape of historic sites. This can be accomplished through effective marketing, quality programs, and an emphasis on its distinctive contribution to history.
- Renovation of the Octagon House and its multiple proposed phases of development will face funding challenges. It is imperative that the Octagon House pursue a diversified funding strategy and build up its revenue-generating potential as quickly as possible.
  - Annual revenues from house tours and memberships may be modest, based on limited visitor sampling and insights from peer case studies.
  - Large private donors and advocates within the General Assembly will be important sources of support that will require significant, long-term effort to cultivate. Turnover among elected officials may complicate this effort.
  - Several of the case study sites we interviewed are embedded within a larger institution and/or are funded annually by a locality, state agency, etc. This provides financial and infrastructural support that stand-alone nonprofit historic sites don't have access to. However, this may come at the expense of losing some autonomy and oversight of the programming.
- Weather and unexpected accidents can damage the property in ways that can't be predicted or budgeted for.
- Neighbors may have concerns about increased traffic, noise, or other nuisances that accompany event venues. It is important to engage adjacent neighbors regarding these issues in advance and throughout operations to avoid formal complaints and address problems as they arise.
- Site growth is contingent on acquiring neighboring properties; this could be a major threat if these site owners do not want to sell their property.
- While there are significant numbers of K-12 students in the region who could engage with the Octagon House, the school curriculum and lack of extracurricular funding may limit the number of fieldtrips that are feasible each year.
  - For fieldtrips to be considered a viable form of revenue, a formal partnership with the school systems in the region would have to specify proposed engagement, frequency of engagement, a reasonable fee per student, and where the funding will come from.

## Operational Feasibility and Economic Impact Assessment

For the purposes of estimating economic impact, the Virginia Tech team proposes visitation estimates based on the existing market data, stakeholder interviews, visitor surveys, case studies, and previous tourism studies. An operational Octagon House is projected to generate approximately 1,500 additional visitors to the county during its first two phases of development, and 3,750 additional visitors during its third and fourth phases of development. It will do this by creating a more comprehensive historical tourism experience that fills current gaps in family-friendly educational attractions and cultural programming. Local residents will benefit from the expanded cultural programming, hands-on workshops, and community event opportunities, while hospitality vendors will see increased business through catering partnerships, wedding services, and visitor spending at complementary businesses.

The combination of increased visitor spending at local restaurants, lodging establishments, and other regional tourist attractions, together with employee salaries, create a multiplier effect that extends well beyond the immediate Octagon House Operations, resulting in an annual economic impact of \$674,784 after the completion of Phase 2, and \$1,585,603 after Phase 4 implementation.

## Operations

As the Octagon House Foundation solidifies its programming, the costs of services will become more evident. The following are some suggested prices based on the findings throughout the report (Table 2). To realize broader economic development benefits, a phased development approach ensures financial sustainability while maximizing community impact. While there is a demand for an operational Octagon House, it is also important to determine the extent to which renovating the home and delivering quality programming and events is feasible given cost and operational constraints. To answer this question, we assume the following phases of development (Table 3), each of which have associated construction costs and operational costs. Each phase also has a unique suite of activities that would be added, increasing the number and type of visitors to the site. For each phase, there are different mixes of revenue, including earned income from events, tickets, and tours; philanthropic donations; and grants from local, regional, and federal sources. Members of the Octagon House Foundation board are working with Project YES to create and validate these estimated costs and revenues.

<b>Service</b>	<b>Cost Per Unit</b>	<b>Phase(s) Active</b>
General House Tour	\$5-10 per person	Phase 1-4
Special Topic Tour	\$15-20 per person	Phase 1-4
General Membership (annual)	\$25 per person	Phase 1-4
Premium Membership (annual)	\$100-200 per person	Phase 1-4
School Fieldtrip (1 day)	\$5-10 per person	Phase 1-4
Annual Event (1 day)	\$20-50 per person	Phase 1-4
Venue Rental (1 day)	\$250-500 per party	Phase 1-4
Hands-On Program	\$35-50 per person	Phase 1-4
Photo Shoot Rental (2 hours)	\$50 per session	Phase 1-4
Summer Camp (1-5 days)	\$100-500 per person	Phase 2-4
Wedding or Conference Rental (3 days)	\$3,000 per event	Phase 3-4
Lodging (1 day)	\$150 per room	Phase 3-4
Dining	\$15-30 per meal	Phase 4

Based on our interviews with key stakeholders and case study sites, some assumptions regarding visitation rate estimates include:

- Local visitors are more likely to attend events like festivals or fundraisers and use the site to rent space for parties and family functions, whereas non-local visitors are more likely to attend during regular hours to attend a tour or hands-on activity.
- Approximately half of all regular visitors will be local (within 30 miles of the site).
- Youth visitors from schools can feed from multiple school districts but this is highly dependent on partnerships and agreements with school leadership. School fieldtrips may not be a significant source of revenue in order to keep costs affordable for students.
- The event venue expansion in Phase 3 will significantly increase event visitors for weddings and conferences.
- Dining and a formal visitors' center added in Phase 4 will cater to more local and non-local daily visitors alike, especially if locals like the food and come back regularly, and will therefore increase visitation rates for a variety of activities.

**Table 3. Anticipated Visitation Rates by Phases of Development for Octagon House Renovation and Program Expansion Over Time**

Phase	Time-frame	Organizational Growth	Additional Infrastructure	Additional Programming	Average Annual Anticipated Ticketed Visitors (local)	Average Annual Anticipated Ticketed Visitors (non-local)	Average Annual Anticipated Youth Visitors (school, camps)	Average Annual Anticipated Event Visitors	Total Annual Visitors	Paid Staffing
Phase 1: Building Renovation & Furnishing	2025-2027	This phase will include all construction costs to complete renovation of the house and furnish the interior.	-Both floors of the house are accessible -Interior restroom(s) -Caterer's kitchen -Period-specific decor	-Full house tours -Small private events (<50 people) -Annual festivals -Temporary visitors' center	500	500	500	1,000	2,500	-PT executive director -PT program manager -PT grounds manager
Phase 2: Outdoor Spaces and Outbuildings	2028-2030	This phase will add a working farm, walking paths, gardens, slaves houses and additional outbuildings to enhance programming opportunities.	-Slave houses and gardens -Chicken coop -Corn crib -Laundry -Smokehouse	-Demonstrations -Walking tours -Photography shoots -Additional event spaces	1,000	1,000	1,000	1,500	4,500	-FT executive director -FT program manager -FT grounds manager -PT grounds assistants

**Table 3. Anticipated Visitation Rates by Phases of Development for Octagon House Renovation and Program Expansion Over Time**

Phase	Time-frame	Organizational Growth	Additional Infrastructure	Additional Programming	Average Annual Anticipated Ticketed Visitors (local)	Average Annual Anticipated Ticketed Visitors (non-local)	Average Annual Anticipated Youth Visitors (school, camps)	Average Annual Anticipated Event Visitors	Total Annual Visitors	Paid Staffing
Phase 3: Lodging & Event Barns	2031-2035	This phase will build out the barns for overnight guests, including for wedding parties.	-6 suites (12 beds) -Dance floor -Small catering kitchen -Storage -Bar -133 seats -Additional restrooms -Acquire adjacent properties	-Weddings -Conferences -Reunions -Large private events (100-150 people)	1,000	1,000	1,000	3,500	6,500	-FT executive director -FT program manager -FT grounds manager -PT grounds assistants -FT events manager -PT events assistant
Phase 4: Dining & Permanent Visitors' Center	2036-2040	This phase will add a dining facility and visitors' center to the site.	-Commercial kitchen -Additional restrooms -Gift shop -Parking lot	-Local dining	1,500	1,500	1,000	4,500	8,500	-FT executive director -FT program manager -FT grounds manager -PT grounds assistants -FT events manager -PT event assistants -PT dining manager -PT dining assistants

## Economic Impact

Based on these visitation and operational estimates, we are able to calculate the anticipated economic impact of the Octagon House on the regional economy. The regional economy is defined as the counties of Smyth, Wythe, Washington, Tazewell, Grayson, and Russell. Although the Octagon House is expected to have distributed benefits to at least all 13 localities in Southwest Virginia, these counties represent the current economic labor shed for the purposes of the economic impact calculation.<sup>17</sup>

For Phases 1 and 2, as seen in Table 2, we assume an additional 750 new non-local day trip visitors, and 250 non-local overnight visitors annually for general visitation, totaling 1,000 non-local visitors for general visitation (e.g., tour tickets). For special events, we assume 400 non-local day-trip and 100 non-local overnight visitors annually, totaling 500 non-local visitors for events like festivals, holiday parties, etc. We only calculate the spending of non-local visitors, because that amount represents new money in the economy that would not exist without the Octagon House. These visitors include those who come to the region specifically to visit the house as their primary destination, and also those travelers who decide to visit Smyth County based on the mix of amenities and attractions, with the Octagon House adding an important and needed family-friendly and historical component that travelers desire and is influential in their decision to visit Smyth County.

We use Virginia Tourism Corporation estimates for the average spending of a history-focused traveler (\$939 per party, per trip) to calculate the anticipated per person spending on lodging, transportation, food and beverage, retail, and recreation and sightseeing.<sup>18</sup> IMPLAN was used to generate the indirect and induced effects of the employment and labor income added, as well as the Value Added and the Output. The Value Added can refer to the wealth created by the industry activity, equivalent to the Gross Domestic Product (GDP), comprised of Employee Compensation (EC), Proprietor Income (PI), Other Property Income (OPI), and Taxes on Production and Imports net of subsidies (TOPI).<sup>19</sup> The Output is comprised of the Value Added plus Intermediate Inputs, which are purchases of non-durable goods and services that are used to produce other goods and services rather than for final consumption.<sup>20</sup> Not all Intermediate Inputs can be fulfilled locally. More details on the assumptions and calculations of this economic impact are included in the appendix.

In addition to visitor spending, we include the hiring of an executive director, program manager, grounds manager, and grounds assistants as additional impact areas. No additional operational spending is included in this model as those costs are not yet known.

Based on these assumptions, the annual estimated economic impact of an operational Octagon House after Phase 2 is complete is \$674,783, and 4.43 jobs (Table 4).

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<sup>17</sup> U.S. Census Bureau. (n.d.). *OnTheMap*. <https://onthemap.ces.census.gov>

<sup>18</sup> Virginia Tourism Corporation. (n.d.). Travel data and profiles. <https://vatc.org/research/travel-data-and-profiles/>

<sup>19</sup> Understanding Value Added (VA). (2019). IMPLAN. <https://support.implan.com/hc/en-us/articles/360017144753-Understanding-Value-Added-VA>

<sup>20</sup> Understanding Intermediate Inputs (II). (2020). IMPLAN. <https://support.implan.com/hc/en-us/articles/360044116233-Intermediate-Inputs>

<b>Table 4. Estimated Annual Economic Impact of the Octagon House by Phase 2</b>				
<b>Impact</b>	<b>Employment</b>	<b>Labor Income</b>	<b>Value Added</b>	<b>Output</b>
Direct	3.18	\$209,939	\$287,354	\$472,861
Indirect	0.65	\$25,567	\$42,773	\$104,188
Induced	0.60	\$26,160	\$58,462	\$97,734
<b>Total</b>	<b>4.43</b>	<b>\$261,666</b>	<b>\$388,589</b>	<b>\$674,784</b>

Phases 3 and 4 will lead to an enhanced visitor experience overall, and the addition of wedding and conference venue spaces and lodging. Phases 3 and 4 also add additional staff capacity. We therefore assume an increase in general non-local visitors to 1,125 day-trip, and 375 overnight visitors annually, totaling 1,500 non-local general visitors. Non-local event visitors will increase to 600 day-trip visitors, and 150 overnight visitors, accounting for 750 non-local visitors for special events like festivals. We further differentiate among types of events for weddings and conferences because these may be longer in duration and will accommodate a specific type of paid visitation. We assume 30 of these events per year with 100 people per event and estimate that half of those visitors will be non-local, including 750 day-trip visitors and 750 overnight visitors, totaling 1,500 non-local visitors.

Operations staff by Phase 4 is estimated to include a full-time executive director, program manager, events manager, grounds manager; and part-time dining manager, events assistants, grounds assistants, and dining assistants.

We also include income earned by independent artisans who teach classes at the Octagon House. Additional impacts generated from events include income to event partners including caterers, wedding planners, and photographers.

Based on these assumptions, after the completion of Phase 4, the projected economic impact will be \$1,585,603 annually, and 11.22 jobs (Table 5).

<b>Table 5. Estimated Annual Economic Impact by Phase 4</b>				
<b>Impact</b>	<b>Employment</b>	<b>Labor Income</b>	<b>Value Added</b>	<b>Output</b>
Direct	8.32	\$482,902	\$679,258	\$1,119,939
Indirect	1.51	\$59,947	\$99,413	\$239,935
Induced	1.39	\$60,419	\$135,026	\$225,728
<b>Total</b>	<b>11.22</b>	<b>\$603,267</b>	<b>\$913,698</b>	<b>\$1,585,603</b>

Therefore, the impact of project growth from Phase 2 to Phase 4 results in:

- 2.6x increase in direct employment (from 3.18 to 8.32 jobs)
- 2.5x increase in total employment (from 4.43 to 11.22 jobs)
- 2.4x increase in total output (from \$674,784 to \$1,585,603)
- 2.4x increase in GDP contribution (from \$388,589 to \$913,698 in value added)

## Recommendations

The following recommendations, organized by category, are based on a synthesis of the findings from the feasibility study and can help to guide the Octagon House Foundation in refining its vision, scope, and capacity in order to meet the tourism demand. The Virginia Tech team workshopped these recommendations with the Octagon House Foundation board in August 2025 to ensure they resonate with the experience and expertise of the board and are attainable over time.

The Octagon House Cultural and Historical Preservation Center should aim to:

### Operations & Logistics

- Conduct thorough research about the site before architectural restoration begins to ensure the historical accuracy of the preservation efforts reflect the structure itself and the individuals who lived there.
  - Work with Smyth County Museum to peruse Mack Sturgill’s extensive research notes to help inform restoration efforts regarding the site’s furnishings, family history, and planting plan.
- Hire paid staff once the house is restored to operate the site with regular hours, reliable programming and regular maintenance. Salaries and wage rates should be attractive enough to retain qualified and passionate personnel.
- Install [Supplemental Guide Signs](#) on I-81 and along the route to the Octagon House to encourage travelers to stop and to help them navigate to the site.
  - If just 0.1% of daily travelers on I-81 decided to visit the house after seeing the sign, that would represent an additional 800 monthly visitors.
- Engage in a strategic and business planning process every three to five years, initiated by the board and facilitated by a third-party consultant, to regularly refine the organization’s vision, mission, development goals, and budgeting projections.
  - These plans can clearly guide grant proposal development for opportunities with a short window to apply.
- Establish a volunteer retention and succession plan that clearly outlines volunteer roles, a recruitment process, and the benefits and perks of volunteering. A paid staff member can serve as a volunteer liaison to ensure volunteers receive the training and support they need to perform in their roles.
- Periodically conduct a preservation needs assessment for the property to ensure all maintenance needs are recorded and a plan is developed to address critical issues in a timely way.
- Finalize the marketing and outreach plan to include branding, a formal process for event publicity, website development and maintenance, cross-site collaboration and partnership strategies.
- Hire an event planner who can oversee the many details involved in scheduling weddings and conferences. At least one event assistant will also be needed the day of to help with set-up, logistics, and clean-up.
  - Wedding venues need to have separate spaces for the bride and groom parties, multiple sets of seating for each activity (e.g., rehearsal dinner, wedding ceremony, etc.), excellent aesthetics for photo opportunities, and ample bathrooms for large parties.
  - As the Octagon House is getting started with large events like weddings, host a styled photo shoot of a sample event, involving partners such as caterers, photographers, etc., to generate marketing materials.
- Keep thorough records of annual visitation rates, including type of visitor and basic demographic information for strategic planning and marketing purposes.

- Engage board members in ongoing training regarding financial management and oversight, volunteer recruitment, strategic and business planning, program design, and marketing and storytelling.
  - Resources such as the Center for Nonprofit Excellence (CNE) may partner with local foundations to offer courses throughout the year, such as the [Strategic Planning Cohort](#).
- Begin navigating the conversation with adjacent neighbors regarding their concerns about increased visitation to the site and their interest in selling property to expand the operations.

## Programming & Vision

- Align with the regional tourism identity of outdoor recreation, Appalachian culture, affordable travel, and American history. The Octagon House needs to distinguish itself from other historic sites while also partnering with adjacent attractions to provide visitors with a “cluster” of activities, such as the main streets of Wytheville, Marion, and Abingdon, Hungry Mother State Park, and cultural attractions such as the Lincoln Theater, Smyth County Museum, the Town of Wytheville Museums, the Abingdon Muster Grounds, and the William King Museum of Art, to name a few.
- Work with Virginia tourism partners to include the Octagon House on local and state tourism websites and in trip “packages” focused on specific travelers, such as visitors interested in Black history. These partners can also help estimate economic impact based on the Octagon House’s visitation data.
- Connect with other octagonal houses throughout the country to cross-promote exhibits and strengthen visitor interest in this unique form of architecture.
- Adapt to include digital technology in exhibits and events, service flexibility such as low-barrier registrations, active and hands-on enrichment experiences, and pet-inclusive accommodations to meet emerging tourism and interpretation trends.
- Develop a self-guided tour using QR codes so that visitors can receive information about the site and view living history videos even when there is no formal program or tour scheduled.
- Continue to research the lineage of the enslaved individuals who lived on the property in order to engage descendants in the mission of the organization moving forward.
- Connect with other cultural and historical buildings in the area that have evidence of slave fingerprints in the handcrafted brick to create a special educational route and lift up the narratives of the enslaved.
  - Create an exhibit focused on the slaves’ fingerprints in the brick that includes hands-on brickmaking or collects visitor reactions to the information.
  - Continue to research the genealogy of the enslaved who labored at Mountain View in an effort to identify descendants who can serve on the board and engage with the mission of the organization.
- Include arts- and nature-based programming and social events, in addition to history-based offerings.
- Develop a series of signature holiday events, such as Halloween ghost tours or Christmas parties, that visitors look forward to each year.
- Identify strategic anniversary dates to promote special programs at the Octagon House, such as Abijah Thomas’ birthday, August 8 (08/08) to correspond to the eight sides of the house, etc.
- Display historic portraits throughout the house.
- Add a playground and outdoor picnic pavilion to the site to accommodate school groups, summer camps, and children attending events with their parents.
- Offer recreational activities such as ropes courses and outdoor skill-building to align with the region’s outdoor recreation tourism strategy and to cater to school groups, summer camps, conference attendees, etc.

- Investigate the feasibility of becoming a “dark sky” destination for stargazing and astronomy education.
- Train a cohort of volunteers and/or staff to provide historical reenactment services; it is important to have multiple people trained to ensure consistent delivery and redundancy in case someone is not available at any given time.
- Invite local community volunteers interested in history to give lectures, offer workshops, and work in the gardens, strengthening ties with community interests and generating in-kind programming.
- Host archeological digs to engage researchers and the community in the historical discovery process. Invite visitors to programs about the renovation and restoration process to educate the public on the steps involved, not just the finished product.
- Offer internships or apprenticeships in a variety of vocational areas, including groundskeeping, historical interpretation and experiential education, or building trades, construction, and renovation, in order to engage more students in the mission and provide employment pathways.
- Keep school fieldtrips rates affordable to ensure that all students can participate. Align the material with the Virginia Standards of Learning (SOLs) to make it easier for teachers to justify the time and expense of visiting.
  - Meet with teachers and school leadership to explore educational opportunities that can be integrated into the curriculum across a variety of subjects.
- Partner with institutions of higher education to create work-study positions with students, semester projects, or connect with faculty expertise for nonprofit development, archeological research, interior design renovations, virtual reality historical recreations and reenactments, and a number of other opportunities.
- Host a variety of community workshops and events on site that cater to local interests and needs, such as public health topics, art classes, organizational and small business development, extracurricular youth competitions, or afterschool youth programs.
- Tell the full story of the history of the house, including its contributions to upholding the institution of slavery and Abijah Thomas’s flaws like chronic credit debt. These details make the site more memorable and meaningful.

## Financial & Funding

- Facilitate regular meetings with a coalition of regional museums and historic sites to leverage resources and information for exhibits, lend artifacts, brainstorm events, and partner on funding opportunities.
- Cultivate relationships with major private donors, such as foundations and individuals, to supplement operational revenues and grant funding for restoration efforts.
- Create a tiered membership system with additional benefits for those paying higher dues, in order to accommodate a variety of income levels and levels of support.
- Lobby local and state elected officials to raise awareness about the project and secure funding for key restoration needs.
  - Advocate for an annual line item within the local government budget to cover basic operational costs and/or maintenance needs.
- Consider contracting out services, such as the operations of the lodging or event venues, to a local business that specializes in hospitality management. This could allow the organization to focus more strategically on its educational and cultural mission.
- Work with larger and well-established partners, such as Virginia Tourism and regional museums, to help fund major annual events.
- Organize an annual fundraiser and set fundraising targets to motivate attendees to meet a specific goal. Consider adding a silent auction and prizes to encourage attendance.

- Work with community partners, including the library, local businesses and restaurants to offer items for the auction.
- Coordinate the annual fundraiser with a biannual mailing campaign to collect donations twice a year, e.g., a Spring and Fall appeal.
- Create an emergency fund for repairs due to unexpected damage to the property.

## Funding Opportunities

### *1772 Foundation: Historic Properties Redevelopment Programs*

**Grant amount:** Up to US \$250,000

**Applicant type:** Nonprofit

The 1772 Foundation has announced that grant funding will be made available for historic properties redevelopment programs throughout the United States. The maximum grant amount is \$250,000. Typical grants have been in the \$50,000-\$75,000 range. (Feasibility studies typically range from \$10,000-\$20,000.)

A historic properties redevelopment program (revolving fund) is an active real estate-based program for protecting endangered properties using techniques such as options, purchase/resale, easements and tax credits. These historic structures ultimately are returned to the private sector with deed restrictions in place. Any proceeds realized from transactions are "recycled" to sustain the proactive preservation efforts of the program. The goal of these programs is community redevelopment using historic preservation as a tool. Funds will support real estate "revolving funds", feasibility studies, real estate training, capital investments, and convenings. This program also emphasizes long-term programmatic sustainability and impact.

**Link to More Information:** <https://www.1772foundation.org/hprp2025>

### *African American Cultural Heritage Action Fund's Descendant and Family Stewardship Initiative*

**Grant amount:** US \$200,000

**Applicant type:** Government Entity, Nonprofit

Across the country, descendant communities and families are engaged in exciting and groundbreaking efforts to reclaim, rescue, and share overlooked stories and places of resilience, achievement, and perseverance. The impact of these efforts deserves admiration, resources, and partnership. Grants from the [African American Cultural Heritage Action Fund's](#) Descendant and Family Stewardship Initiative will empower and equip descendant-led and family-led organizations and projects to preserve, activate, and manage historic places. This initiative is a testament to our belief in the capacity of descendant communities and families to be full partners and leaders in the physical preservation, interpretative programming, management, and governance of historic places.

The Descendant and Family Stewardship Initiative is not just another grant funding opportunity. It's a unique, multi-year partnership and investment opportunity with one grant funding category – Stewardship Project. Powered by the Mellon Foundation's Humanities in Place, the Action Fund will award five grants and invest \$200,000 per grantee, providing specialized consultation and best practices support for a period of two years.

Descendant and Family Stewardship Grants support project management, capacity-building, grantmaking, and convenings for place-based organizations. In collaboration and consultation with the Action Fund, the selected grantees will engage in the following activities during the two-year grant period as we work together to preserve American history and model new approaches in historic preservation:

- Completing a Stewardship Project needs assessment to inform the scope of work, the use of the grant funds, and define project milestones and deliverables.
- Receiving \$200,000 in grant funds to develop a Stewardship Plan and launch the implementation of its recommendations.
- Promoting the partnership, process, and lessons learned for other stewarding organizations to replicate.
- Participating in convenings with initiative stakeholders to share best practices, build community, and advance the field.

The Stewardship Project's scope of work, for example, can include architectural and design services, strategic and fundraising planning, interpretation and program development, community engagement and audience development, staff support, limited capital and restoration, and other priorities established through the assessment process.

The Action Fund provides consultation to meet our grantees' organizational needs and priorities. Our role as the grantor is to work hand in hand with our grantee partners through a collaborative process focused on asset management of heritage resources and holistic stewardship visioning and planning. Project partners will work as a team to achieve the grantee's short-term and long-term stewardship goals.

Today, the preservation field has varying views on defining "descendant," though it is often used in connection to heritage sites associated with slavery, such as a plantation, burial ground, or jail. The Descendant and Family Stewardship Initiative is a collaborative effort that values the input of all stakeholders. Our work with grantees includes strategic collaboration across the historic preservation field to define "descendant" and establish more broadly-adopted language. For example, descendant communities can include a direct blood lineage or historical affiliation to a site of enslavement, like Virginia's Sharswood Plantation, or social movements in education and civil rights, such as Washington-Rosenwald Schools, Birmingham Foot Soldiers, and the Tulsa Race Massacre.

The African American Cultural Heritage Action Fund is committed to understanding the different perspectives of descendant-led organizations and projects and seeks your help. Therefore, applicants for this grant can define "descendant" for themselves and make the case that their organization and project are descendant-led and family-led on the Letter of Intent (LOI) form. We deeply respect and value the unique perspectives and experiences that each organization brings to the table.

In addition to descendant-led, family-led describes organizations where family members with direct ties to a historic place help steward the site, such as a granddaughter advocating for Virginia's [Anne Spencer House and Garden Museum](#), siblings volunteering at Philadelphia's John Coltrane Home, or a family saving a legacy farm. It may also include property owners of a historic residence or venue associated with Black history, actively supporting its preservation, public access, and interpretation.

**Link to More Information:** <https://savingplaces.org/descendant-initiative-guidelines>

*Appalachian Regional Commission Ready Grants to Grow (G2G)*

**Grant amount:** US \$100,000 - US \$500,000

**Applicant type:** Government Entity, Indigenous Group, Nonprofit

The READY G2G Initiative actualizes ARC's vision of ensuring the Region achieves socioeconomic parity with the nation. READY G2G aims to invest in strategies that grow the region's capacity through sustainable and outcome-driven projects related to ARC's other investment priorities: building Appalachia's businesses, workforce ecosystem, infrastructure, and regional culture and tourism.

- Goal 1: Building Appalachian Businesses
  - Strengthen and diversify the region's economy through inclusive economic development strategies and investments in entrepreneurship and business development.
- Goal 2: Building Appalachia's Workforce Ecosystem
  - Expand and strengthen community systems (education, healthcare, housing, childcare, and others) that help Appalachians obtain a job, stay on the job, and advance along a financially sustaining career pathway.
- Goal 3: Building Appalachia's Infrastructure
  - Ensure that the residents and businesses of Appalachia have access to reliable, affordable, resilient, and energy-efficient utilities and infrastructure in order to successfully live and work in the region.
- Goal 4: Building Regional Culture and Tourism
  - Strengthen Appalachia's community and economic development potential by preserving and investing in the region's local cultural heritage and natural assets.

**Link to More Information:** <https://www.arc.gov/ready/grants-to-grow/>

*Bank of America Philanthropic Solutions*

**Grant amount:** Up to US \$100,000

**Applicant type:** Nonprofit

Bank of America serves as trustee or co-trustee on a wide variety of discretionary charitable foundations. As stewards of these charitable funds, they work to award meaningful grants in accordance with the philanthropic mission of each donor. Provided here are applicable charitable foundations in Virginia who have provided philanthropic support for SWVA organizations.

*The George J. & Effie L. Seay Foundation* was established in 1957 to support and promote arts, culture & humanities, education, and human services programs and services provided by qualifying charitable organizations in the Commonwealth of Virginia. The George J. & Effie L. Seay Foundation deadline is March 1. Applicants will be notified of grant decisions by June 30. The Seay Foundation makes grants primarily for programs and projects designed to provide specific services or training. Requests for general operating grants will **not** be considered. Grants from the Seay Foundation are 1 year in duration. Because requests for support usually exceed available resources, organizations are advised to apply to either the Morgan Trust or the Seay Foundation. While receipt of a grant does not preclude later support, an organization normally will not be considered for another grant from either the Morgan Trust or the Seay Foundation until at least 3 years after the date of the last grant payment. Previous grantees in SWVA include Pro-Art Association, William King Museum, and Communities in Schools of Appalachian Highlands.

*The Marietta McNeill Morgan & Samuel Tate Morgan, Jr. Trust* was established in 1962 to support and promote quality educational and human services programming in the Commonwealth of Virginia. The Marietta McNeill Morgan & Samuel Tate Morgan, Jr. Trust deadline is March 1. Applicants will be notified of grant decisions by June 30. The Morgan Trust **only** makes grants for specific capital expenditures and not for general capital campaign expenditures. Matching and challenge grants are strongly encouraged. Grants usually are not paid until the grantee has sufficient funds in hand, pledged, or borrowed to complete the proposed project. Grants from the Morgan Trust are 1 year in duration. Because requests for support usually exceed available resources, organizations are advised to apply to either the Morgan Trust or the Seay Foundation. While receipt of a grant does not preclude later support, an organization normally will not be considered for another grant from either the Morgan Trust or the Seay Foundation until at least 3 years after the date of the last grant payment.

Previous grantees in SWVA include New Beginnings of SWVA, Virginia Intermont College, EO Companies, Trailview Development Corporation, Barter Theatre, Emory & Henry College, Blue Ridge Discovery Center, Mount Rogers Community Services, and Helping Overcome Poverty's Existence, Inc.

*The Richard & Caroline T. Gwathmey Memorial Trust* was established by Mrs. Elizabeth Gwathmey Jeffress in 1981 in memory of her parents. Mrs. Jeffress was particularly interested in the history, literature, art and architecture of Virginia.

Applications from nonprofits focused on the following issue areas will be accepted for the March 1 deadline (notification by June 30):

- Ensuring access to basic services – food, health care, shelter and/or safety
- Creating, sustaining and retaining a viable workforce for Virginia
- Preserving and protecting the environment

Applications from nonprofits focused on the following issue areas will be accepted for the September 1 deadline (notification by December 31):

- Providing access to arts, culture and/or humanities
- Preserving the important history of Virginia
- Improving educational outcomes for disadvantaged children, youth and/or adults

The typical grant range: \$5,000 - \$60,000.

Type of support: One-year funding for program and general operating support. No capital or endowment support will be considered.

Special note: The Gwathmey Memorial Trust Allocation Committee is keenly focused on making geographically diverse investments across the Commonwealth of Virginia. Applications should be from established non-profit organizations seeking support for its overall operations, or a specific project with well-defined outcomes, clear definition of the return on investment and funding from an array of sources beyond the Gwathmey Memorial Trust.

In addition, nonprofits that receive support from the Gwathmey Memorial Trust will not be considered for additional funding sooner than 3 years from the award date of the previous grant. Previous grantees in SWVA include Coalfield Water Development Fund, Mountain Heritage, Inc., Communities in Schools of Appalachian Highlands, William King Museum, People, Inc., Barter Theatre, and Bluefield University.

**Link to More Information:** <https://www.bankofamerica.com/philanthropic/search/?program=0&area=VA>

*Bella Vista Foundation / Marcia & Marvin Gilliam, Jr. Foundation*

**Grant amount:** US \$5,000 – US \$250,000

**Applicant type:** Nonprofit

The Bella Vista Foundation / Marcia & Marvin Gilliam, Jr. Foundation is based in Bristol, VA. Funding priorities include adult education, arts & culture, Christianity, foundations, graduate and professional education, healthcare clinics, higher education, museums, music, orchestral music, and performing arts. Grants are usually given for general operations, scholarship funding, and capital projects.

**More Information:** (276) 525-1620

*Cabell Foundation Semi-Annual Competitive Grant*

**Grant amount:** Unspecified

**Applicant type:** Nonprofit

The cornerstone of the competitive grants program provides support for permanent, capital projects with a preference for Richmond-area needs. Generally, awards are made on a challenge or match basis in order to help stimulate broad community support. The challenge may be in any form, such as matching the award in some multiple of the grant, raising a stated percentage of the total goal, securing a specified number of new gifts or other parameters set by the Foundation. Typically, no more than 50% of the matching funds for a challenge grant may come from other private foundations. Depending on the specific circumstances of each project, other conditions may be required prior to payment. Grant periods are typically 12-18 months from the date of the award notification. Competitive grants are generally paid in one payment. Proposals are reviewed twice a year during the Spring and Fall Grants meeting.

**Funding Areas of Interest**

The Foundation is multi-purpose in its support and accepts proposals from organizations that represent the following categories. Funding is not allocated across these program areas. The competitive nature of the proposals drives funding recommendations and decisions. Representative examples of grants in each category are listed below.

**Cultural Arts:** Museum exhibitions and expansion; collection processing and storage; performing arts venue renovations; building acquisition; and, technology infrastructure.

**Civic & Community:** Neighborhood development initiatives; civic engagement projects; and, recreational projects that promote increased access to public spaces regardless of economic or physical limitations.

**Conservation & Environment:** Watershed protection and preservation; reclamation projects; wildlife protection; and, environmental outreach and education.

**Education:** Libraries; laboratories and equipment; technology; and, general physical plant support to private colleges and universities. Limited support for capital needs related to workforce training and development projects at the community college level. The Foundation also supports special projects at Virginia Commonwealth University, The College of William & Mary and Virginia Military Institute.

**Historic Preservation:** Site acquisition; infrastructure repair; exterior and interior renovations; and, exhibit installation.

**Social Services, Health & Welfare:** Building acquisition and/or renovation for health clinics; affordable

housing; domestic violence shelters; vocational rehabilitation; and, mental health services. Technology and equipment support for hunger relief programs; healthcare clinics; and job training.

**Link to More Information:** <https://thecabellfoundation.org/contact/>

### *DAR Historic Preservation Grants*

**Grant amount:** Up to US \$10,000

**Applicant type:** Nonprofit

Since our founding in 1890, the National Society of the DAR has supported historic preservation as one of our three main mission areas (along with patriotism and education). In tens of thousands of locations around the world, we have saved historic properties, erected historic markers, digitized documents and helped to preserve the American story in thousands of meaningful ways. We're proud to also provide \$250,000 in grants annually to support historic preservation efforts in local communities. The DAR Historic Preservation Grants provide financial assistance for projects that preserve historic resources, sites and other history-related projects. Examples include restoration of historic buildings; digitization or preservation of documents/records; preservation of historical items/artifacts; erection of new or rededication/relocation of existing historical markers; cemetery headstone and monument conservation, etc.

#### **Eligibility**

- Please note that each application must be accompanied by a DAR chapter or state organization sponsorship letter ([find a local DAR chapter here](#))
- Projects considered for grants must support the DAR mission area of historic preservation, and successful applicants must agree to publicly recognize DAR's contribution.
- In order to assure ultimate completion of the project, all other funding (beyond that requested via this grant) must be already firmly secured. Projects should be tangible and long-lived, with lasting historic preservation benefit.
- Recipients awarded a DAR Historic Preservation Grant during one administration must wait until the next DAR administration (e.g., July 2025–June 2028) before applying for an additional grant for another project or a different phase of the same project.
- DAR Chapters and State Societies are eligible to apply for grants associated with properties/sites that are owned or operated by the DAR entity and included in the NSDAR Historic Sites database.

#### **Preferences**

- Projects related to all chapters of American history will be considered; however, preference will be given to those projects that relate to the Colonial-through-the-Federal periods.

#### **Ineligibility**

- Ineligible requests include administrative or operating expenses (e.g., rent, salaries, benefits, utilities, printing); surveys; permits; travel (e.g., mileage, lodging, meals, site rental); food/beverage; vehicles; fundraising; conferences; reenactments, performances; trips, camps, workshops; political activities; construction of new facilities, and creation of displays or exhibits.
- Funding will not be approved for State Regent Projects, for digitizing Chapter records, or for other lineage societies projects.

**Link to More Information:** <https://www.dar.org/national-society/dar-historic-preservation-grants>

### *Decorative Arts Trust Curatorial Internship Grants*

**Grant amount:** Up to US \$80,000

**Applicant type:** Graduate Student, Nonprofit, Postdoctoral Researcher

The mission of the Decorative Arts Trust, a non-profit organization, is to promote and foster the appreciation and study of the decorative arts. We achieve our mission through:

- Exchanging information through domestic and international programming;
- Collaborating and partnering with museums and preservation organizations; and
- Underwriting internships, research grants, and scholarships for graduate students and young professionals.

The Trust underwrites curatorial internships for recent Masters or PhD graduates in partnership with museums and historical societies. These internships allow host organizations to hire a deserving young professional who will learn about the responsibilities and duties common to the curatorial field while working alongside a talented mentor. The Trust's internship program seeks to provide mutually beneficial opportunities that will nurture the next generation of museum curators while providing essential staffing for the host. The Trust encourages projects that advance diversity in the study of American decorative arts and will have a defined impact on the professional development of emerging scholars.

We currently offer two 24-month internships with one grant cycle opening per year. For this cycle, the Trust is offering a two-year grant with \$40,000 available per year for the intern's salary. The Trust requires the host organization to allocate funds for the intern's health insurance and other available benefits.

**Link to More Information:** <https://decorativeartstrust.org/grants-and-scholarships/curatorial-internship-grants/>

### *Decorative Arts Trust Dean F. Failey Grant*

**Grant amount:** Up to US \$15,000

**Applicant type:** Nonprofit

The Decorative Arts Trust underwrites grants in support of noteworthy research, exhibition, and object-based conservation projects through the Dean F. Failey Fund, named in honor of the Trust's late Governor. Areas of interest include new scholarship in decorative arts, material culture, craftsmanship, and historic preservation. Grants for up to \$15,000 are awarded on an annual basis. The Trust also aims to support colleagues and projects that represent the full diversity of our field. Preference will be given to projects that employ or are led by young professionals in the museum field.

**Link to More Information:** <https://decorativeartstrust.org/failey-grant/>

### *Decorative Arts Trust IDEAL Internship Grants*

**Grant amount:** Up to US \$5,000

**Applicant type:** Nonprofit

IDEAL Internships focus on inclusivity, diversity, equity, access, and leadership. The Trust recognizes the homogeneity of the museum field and strives to improve access to curatorial careers for students of color as a path toward achieving systemic change. The Trust will help build a more inclusive future by creating opportunities for students of color through new collaborations that promote a shift in the narratives and voices found in the museum field. The Trust is offering grants for up to \$5,000 to museums and historic

sites in support of internships that improve and promote inclusivity, diversity, equity, access, and leadership in the museum field by creating opportunities for underrepresented communities. The Trust seeks to fund summer and academic-year internships, ideally for disadvantaged high school and undergraduate students. Internships should focus on the decorative arts and object-based research, exhibitions, installations, and educational programs. There is an opportunity for a second year of funding if the grantee institution can demonstrate sufficient impact.

The Trust seeks partners—including art museums, history museums, and historic sites—with a demonstrated commitment to serving the breadth of their local community, thereby allowing the Trust to contribute to their mission through an IDEAL internship. Potential partners should have an established track record of hosting successful inclusivity internships and the ability to offer internships that are led by or include the mentorship of museums professionals of color.

Museums and historic sites with established connections to high schools, Historically Black Colleges and Universities, and public institutions of higher education that primarily serve communities of color should utilize those networks to promote an IDEAL internship. Interns will work toward a defined end goal or capstone project that ensures their academic and professional growth. Whenever possible, the interns' goals and expectations will be incorporated into the assigned work. The Trust expects partners to provide opportunities for broader professional development, peer-to-peer networking, and public outreach through tours and presentations.

**Link to More Information:** <https://decorativeartstrust.org/grants-and-scholarships/ideal-internship-grants/>

*FY2024 Historic Preservation Fund - Paul Bruhn Historic Revitalization Subgrant Program*

**Grant amount:** US \$200,000 - US \$750,000

**Applicant type:** Nonprofit, Government Entity, Indigenous Group

The goal of the Paul Bruhn Historic Revitalization Grants Program is to fund subgrant programs that support the rehabilitation of historic properties to foster economic development in rural communities. These subgrant programs, managed by States, Tribes, Certified Local Governments, special district governments, and non-profits will select, fund, and manage preservation projects for historic properties to include architectural/engineering services and physical preservation.

**Link to More Information:** National Parks Service [NOFO](#)

*FY2025 - Historic Preservation Fund - Annual State Historic Preservation Office Grants*

**Grant amount:** US \$10,000 - US \$2,200,000

**Applicant type:** Government Entity, Nonprofit

This funding program supports the operation of State Historic Preservation Offices (SHPOs) in the 50 states, 5 territories, 3 Freely Associated States, and District of Columbia within allowable program areas as described in the National Historic Preservation Act (54 USC 3001 et. sec). Where relevant, staff and projects must comply with the appropriate Secretary of the Interior's Standards. The purposes of this program are to provide matching grants to States for the identification, evaluation, and protection of historic properties by such means as: survey, planning, technical assistance, physical preservation,

Federal tax incentives available for historic properties, nominations to the National Register of Historic Places, distribution of funding to Certified Local Governments, and to assist Federal, State, and Local Government agencies, nonprofit organizations and private individuals in carrying out historic preservation activities. Awards under this program must comply with and support 54 U.S.C. 3001 et seq. (commonly known as the National Historic Preservation Act).

**Link to More Information:** National Parks Service [NOFO](#)

#### *FJ Brotherton Charitable Trust Grant*

**Grant amount:** Unspecified amount

**Applicant type:** Nonprofit

The FJ Brotherton Charitable Trust was established in 2024 to continue the work of the Fred J. Brotherton Charitable Foundation, which was dissolved the same year. The FJ Brotherton Charitable Trust helps to fulfill the missions of charitable organizations falling within its grant making guidelines.

The Trust's main areas of interest are:

- Arts and Culture
- Community, Housing and Social Services
- Education
- Historic Preservation
- Medical Programs
- Scientific Research

The primary geographic areas of funding are the northeastern United States, and along the eastern seaboard, however there are exceptions.

**Link to More Information:** <https://fjbrothertoncharitabletrust.org/apply/>

#### *Food City Charitable Foundation*

**Grant amount:** US \$5,000 +

**Applicant type:** Nonprofit

Funding interests include arts & culture, arts education, community & economic development, education, education services, health, human services, nonprofits, performing arts, philanthropy, religion for youth, and youth development. Population groups include adults, children & Youth, low-income people, and students. Purpose and activities of the foundation include providing local nonprofit organizations throughout the region with the additional funds needed to decrease their shortfalls. Food City believes in giving back to the communities they serve by partnering with non-profit organizations throughout their market area to make our region a better place to live, work, and educate the region's children.

On July 31, 2025, Food City broke ground on a new location in Marion. The new 56,000 ft<sup>2</sup> supermarket, set to be located at 1025 North Main Street, will be more than 10,000 ft<sup>2</sup> larger than the current store. The new store is expected to create approximately 50 new jobs. This investment from Food City may indicate good timing for further investment from Food City in the Marion community.

**Link to More Information:** [baumgardnert@foodcity.com](mailto:baumgardnert@foodcity.com) (Tammy Baumgarder, Director of Public Relations)

*Hart Family Fund for Small Towns*

**Grant amount:** US \$2,500 - US \$15,000

**Applicant type:** Government Entity, Nonprofit

The Preservation Leadership Forum of the National Trust for Historic Preservation is a network of preservation leaders — professionals, students, volunteers, activists, experts — who share the latest ideas, information, and advice, and have access to in-depth preservation resources and training.

Grants from the Hart Family Fund for Small Towns are intended to encourage preservation at the local level by providing seed money for preservation projects in small towns with populations of 10,000 or less. These grants help stimulate public discussion, enable local groups to gain the technical expertise needed for particular projects, introduce the public to preservation concepts and techniques, and encourage financial participation by the private sector.

Grants from the Hart Family Fund for Small Towns generally range from \$2,500 to \$15,000. The selection process is very competitive. The review process is generally completed within three months of the application deadline, and applicants are notified via email once the review process is complete.

**Link to More Information:** <https://savingplaces.org/hart-family-fund>

*Henry A. Jordan, M.D., Preservation Excellence Fund - Mid-Atlantic States*

**Grant amount:** Up to US \$5,000

**Applicant type:** Organizations

The Preservation Leadership Forum of the National Trust for Historic Preservation is a network of preservation leaders — professionals, students, volunteers, activists, experts — who share the latest ideas, information, and advice, and have access to in-depth preservation resources and training.

The National Trust for Historic Preservation's Henry A. Jordan, M.D., Preservation Excellence Fund provides funding to deserving organizations demonstrating commitment to the protection of natural and cultural resources in the Mid-Atlantic region. The Jordan Preservation Excellence Fund was established in November 1996 in recognition of Dr. Jordan's distinguished service to the National Trust and his visionary leadership of the national preservation movement. Applicants can apply for up to \$5,000.

The fund awards programs and activities that:

- Facilitate positive dialogues between the diverse interests of historic preservation, land conservation, business development, transportation, and government in a search for common ground in protecting the environment
- Stimulate the development of local and state policies that protect the cultural landscape and its resources
- Heighten public awareness of or increase involvement in issues relating to the livability and sustainability of communities
- Encourage innovative partnerships and approaches to open space conservation and historic preservation

**Link to More Information:** <https://savingplaces.org/jordan-fund>

### *Johanna Favrot Fund for Historic Preservation*

**Grant amount:** US \$2,500 - US \$15,000

**Applicant type:** For-Profit Business, Government Entity, Nonprofit, Individuals

The Preservation Leadership Forum of the National Trust for Historic Preservation is a network of preservation leaders — professionals, students, volunteers, activists, experts — who share the latest ideas, information, and advice, and have access to in-depth preservation resources and training.

In July 1994, the Johanna Favrot Fund for Historic Preservation was created in honor of Johanna Favrot's 80th birthday. The fund aims to save historic environments in order to foster an appreciation of our nation's diverse cultural heritage and to preserve and revitalize the livability of the nation's communities.

Grants from the Johanna Favrot Fund for Historic Preservation generally range from \$2,500 to \$15,000. The selection process is very competitive. The review process is generally completed within three months of the application deadline, and applicants are notified via email once the review process is complete.

**Link to More Information:** <https://savingplaces.org/favrot-fund>

### *Mary Morton Parsons Foundation Grant*

**Grant amount:** US \$50,000 - US \$500,000

**Applicant type:** Nonprofit

The Mary Morton Parsons Foundation was founded in 1988 by Mrs. Mary Morton Parsons as a private, non-operating foundation to support the capital needs of charitable organizations. To date, the Foundation has awarded approximately \$73 million to qualified grantees.

The Mary Morton Parsons Foundation enriches communities across the Commonwealth of Virginia by providing capital support to cultural arts institutions, historic preservation sites, environment and conservation initiatives, community development efforts, education infrastructure, and the social services sector.

#### Arts & Culture

Virginia's residents and visitors love Arts & Culture. That's why The Mary Morton Parsons Foundation supports organizations that deliver cultural experiences through music, theatre, and visual and performing arts.

#### Civic & Community Needs

The Mary Morton Parsons Foundation funds organizations that provide services to revitalize neighborhoods and local businesses, develop citizen leadership skills, bolster economic development, contribute to workforce training, and strengthen civic engagement.

#### Education

From early childhood education to university and professional continuing education, The Mary Morton Parsons Foundation is proud to support educational organizations in the Commonwealth. We contribute funds to public, private, and faith-based schools that support both students and teachers.

#### Environment & Conservation

To encourage responsible stewardship of the vast natural resources in the Commonwealth, The Mary

Morton Parsons Foundation provides grants to conservation and environmental organizations.

#### Historic Preservation

The Commonwealth of Virginia has a deep and long history. The Mary Morton Parsons Foundation is committed to preserving historically significant structures for future generations.

#### Social Services & Welfare

The Mary Morton Parsons Foundation funds nonprofit organizations that address a wide range of human needs and aspirations. The Foundation serves people of all ages, socio-economic statuses, and backgrounds.

#### ***Application Deadline Information***

- Spring Cycle: Contact Form must be submitted by Feb 28. Application must be submitted by March 17 (Foundation response Early June)
- Fall Cycle: Contact Form must be submitted by August 29. Application must be submitted by September 15 (Foundation response Early December)  
If these dates fall on a weekend or holiday, applications will be accepted until 5:00pm on the first business day following.

**Link to More Information:** <https://www.mmparsonsfoundation.org/focus-areas/>

#### *The Moe Family Fund for Statewide and Local Partners Grant Program*

**Grant amount:** Up to US \$10,000

**Applicant type:** Nonprofit

The Moe Family Fund for Statewide and Local Partners supports current dues-paying members of the National Preservation Partners Network (NPPN) with grants focused on strengthening preservation organizations and addressing pressing issues in the preservation field. This year, grant-funded projects will fall in one of three categories:

- Advocacy
- Capacity Building
- Climate Change

While recognizing there are interconnections between these categories, applicants must select one main category for the project. Applicants can describe overlapping aspects with a second category in the application. Applicants are encouraged to embark on projects and activities outside the existing scope of their work, but the Fund also will support initiatives that take existing programs to a new level. Projects may stand alone or be part of a larger initiative. The selection committee will select grant recipients by considering, among other factors, the following criteria:

- Degree to which the proposed project will address one of the three identified categories
- Creativity and innovation above and beyond the organization's existing programs, or the extent to which an existing program is being taken to a new level
- Evidence that the activity or project would probably not be undertaken without this seed money
- The projected outcome of the project and the potential for catalytic effect
- Potential for demonstrable short-term and long-term impact
- Replicability and transferability, i.e., potential for the project or activity to be a model for other Partner organizations
- The project's budget and the applicant's proven ability to secure a match

- Potential to leverage additional funds for the project
- Realistic timeline for the project
- Qualifications of the key personnel, including consultants
- Demonstrated ability of the applicant to complete preservation projects

**Link to More Information:** <https://savingplaces.org/moe-fund>

*National Trust for Historic Preservation Cynthia Woods Mitchell Fund for Historic Interiors*

**Grant amount:** US \$2,500 - US \$15,000

**Applicant type:** For-Profit Business, Government Entity, Nonprofit, Individuals

In July 1997, George P. Mitchell made a generous gift to the National Trust for Historic Preservation to establish the Cynthia Woods Mitchell Fund for Historic Interiors in honor of his wife. The purpose of the fund is to assist in the preservation, restoration, and interpretation of historic interiors. Grants from the Cynthia Woods Mitchell Fund for Historic Interiors generally range from \$2,500 to \$15,000. The selection process is very competitive. The review process is generally completed within three months of the application deadline, and applicants are notified via email once the review process is complete.

Grants from the Mitchell Fund are awarded for planning activities and education efforts focused on the preservation of historic interiors. Grants may be made for activities and projects such as:

- Obtaining professional expertise in areas such as architecture, planning, paint analysis, archeology, or graphic design
- Hiring a preservation architect to create an interior restoration plan
- Hiring a consultant to develop a conservation plan for an interior's textiles
- Producing a historic furnishings plan
- Sponsoring a workshop on the preservation of historic interiors
- Restoration, rehabilitation, stabilization, and preservation of designated historic interiors, including bricks-and-mortar interior construction

**Eligible Expenses**

- Fees for consultant services
- Speaker/faculty costs (honoraria, travel, and lodging), room rental for conferences
- Mailing costs for distribution of materials
- Web site development
- Materials and services such as printing, photographs, telephone, and supplies.

**Link to More Information:** <https://savingplaces.org/cynthia-woods-mitchell-fund>

*National Trust Preservation Funds*

**Grant amount:** US \$2,500 - US \$5,000

**Applicant type:** Government Entity, Nonprofit

Grants from National Trust Preservation Funds (NTPF) are intended to encourage preservation at the local level by supporting on-going preservation work and by providing seed money for preservation projects. These grants help stimulate public discussion, enable local groups to gain the technical expertise needed for preservation projects, introduce the public to preservation concepts and techniques, and encourage financial participation by the private sector. A small grant at the right time can go a long way and is often the catalyst that inspires a community to take action on a preservation project. Grants

generally start at \$2,500 and range up to \$5,000. The selection process is very competitive.

National Trust Preservation Fund grants are awarded for planning activities and education efforts focused on preservation. Grant funds can be used to launch new initiatives or to provide additional support to on-going efforts.

Planning: Supporting existing staff (nonprofit applicants only) or obtaining professional expertise in areas such as architecture, archaeology, engineering, preservation planning, land-use planning, and law.

Eligible planning activities include, but are not limited to:

- Hiring a preservation architect or landscape architect, or funding existing staff with expertise in these areas, to produce a historic structure report or historic landscape master plan.
- Hiring a preservation planner, or funding existing staff with expertise in this area, to produce design guidelines for a historic district.
- Hiring a real estate development consultant, or funding existing staff with expertise in this area, to produce an economic feasibility study for the reuse of a threatened structure.
- Sponsoring a community forum to develop a shared vision for the future of a historic neighborhood.
- Organizational capacity building activities such as hiring fundraising consultants, conducting board training, etc.

Education and Outreach: Support for preservation education activities aimed at the public. The National Trust is particularly interested in programs aimed at reaching new audiences. Funding will be provided to projects that employ innovative techniques and formats aimed at introducing new audiences to the preservation movement, whether that be through education programming or conference sessions.

**Link to More Information:** <https://savingplaces.org/preservation-funds>

*Norfolk Southern Corporate Giving: Thriving Communities Grant Program*

**Grant amount:** US \$1,000 - US \$50,000

**Applicant type:** Government Entity, Nonprofit, Public Elementary / Secondary School

Last year, Norfolk Southern contributed nearly \$9.5 million dollars to charitable organizations across our network in the following focus areas:

- Safety
- Sustainability
- Workforce Development
- Thriving Communities

The Thriving Communities Grant Program is designed to promote sustainability initiatives, workforce development programs, and community resiliency efforts across Norfolk Southern's 22-state network. It is also designed to promote economic development, support vibrant community life, and provide equal access to basic necessities. Grants are awarded for specific projects and programs only, not for general operating support.

**Link to More Information:** <https://www.norfolksouthern.com/en/commitments/in-your-community/community-impact/grant-programs>

*Richard & Caroline T. Gwathmey Memorial Trust Grants*

**Grant amount:** US \$5,000 - US \$60,000

**Applicant type:** Nonprofit, Government Entity, Indigenous Group

The Richard & Caroline T. Gwathmey Memorial Trust was established by Mrs. Elizabeth Gwathmey Jeffress in 1981 in memory of her parents. Mrs. Jeffress was particularly interested in the history, literature, art and architecture of Virginia.

Applications from nonprofits focused on the following issue areas will be accepted for the March 1 deadline (notification by June 30):

- Ensuring access to basic services – food, health care, shelter and/or safety
- Creating, sustaining and retaining a viable workforce for Virginia
- Preserving and protecting the environment

Applications from nonprofits focused on the following issue areas will be accepted for the September 1 deadline (notification by December 31):

- Providing access to arts, culture and/or humanities
- Preserving the important history of Virginia
- Improving educational outcomes for disadvantaged children, youth and/or adults

**Eligibility:**

- The Gwathmey Memorial Trust Allocation Committee is keenly focused on making geographically diverse investments across the Commonwealth of Virginia.
- Applications should be from established non-profit organizations seeking support for its overall operations, or a specific project with well-defined outcomes, clear definition of the return on investment and funding from an array of sources beyond the Gwathmey Memorial Trust.
- One-year funding for program and general operating support.

**Ineligibility:**

- No capital or endowment support will be considered.
- Nonprofits that receive support from the Gwathmey Memorial Trust will not be considered for additional funding sooner than 3 years from the award date of the previous grant.

**Link to More Information:** <https://www.bankofamerica.com/philanthropic/foundation/?fnId=123>

*Smyth County Charitable Fund / Smyth County Community Foundation*

**Grant amount:** US \$5,000 +

**Applicant type:** Nonprofit, Governmental, Faith-based

Smyth County Community Foundation and Smyth County Charitable Fund are working toward building a community where all people can lead healthy, successful lives and are inspired to help one another. Our mission statement is “Partnering to create pathways for a stronger community that give hope and opportunity for a brighter future.” Through our grants program, we partner with area non-profits and individuals to further our mission and make a big impact in Smyth County.

The focused priorities for grantmaking, scholarships and activities across SCCF are health, wellness and education of all residents in Smyth County and bordering communities. Your grant request must illustrate how your project meets one or more of these priorities.

### **General Grant Information**

- Grant applications will be reviewed on a first-come, first reviewed basis.
- All grant applications must be submitted to the following email: [info@smythccf.org](mailto:info@smythccf.org).
- We have two grant cycles per year. Applications are due January 1 for our winter cycle consideration and July 1 for our summer cycle consideration.
  - Only fully completed applications will be accepted and reviewed.
  - Grant applications received after the close date will be added to the next cycle.
  - All materials for a grant application must be submitted by the grant cycle close date for the grant to be fully reviewed.
- SCCF has limited funds to support grant applications.
  - The total amount of funds available changes from year to year.
  - Receiving a grant in no way guarantees future grant application success.
  - There is no limit to the amount of funding that an applicant may request.
  - The submitted materials in the application should evidence the need for the amount requested.
  - When appropriate or due to limited fund availability, SCCF may approve a grant for a lower amount of funding than indicated on the grant application.
- All decisions regarding grant applications, including approval and amount of funding, are final and cannot be appealed.
- The grant application includes four sections (pages 3-8 of this document):
  - Section I: Cover Letter
  - Section II: Organization/Project General Information
  - Section III: Grant Request Information
  - Section IV: Signature Section
- All sections must be completed and the application must be signed. The sections are relatively self-explanatory, however, if you have any questions, please email SCCF.

### **Focused Priorities**

Our focused priorities for grantmaking, scholarships, and activities across SCCF include:

- Health
- Wellness
- Education

### **Eligibility Requirements**

- Community-based public or private non-profit holding a 501(c)(3) tax exemption status
- Governmental agency
- Mission-related organization utilizing a SCCF-approved 501(c)(3) sponsor
- Faith-based organizations (for non-religious programs serving the broader community)

### **Highest Priorities**

- Clearly align with the Foundation's focused priorities
- Are collaborative with other non-profit organizations
- Have other funding sources
- Impact multiple areas of need
- Do not duplicate existing services provided in our community
- Can yield and share relevant outcomes that advance SCCF's mission
- Present clear, compelling, and credible evidence of need

### ***SCCF Does Not Fund***

- directly to individuals (except scholarships);
- projects outside our community;
- political activities;
- for-profit organizations;
- purposes that are identified as typical financial budgetary responsibilities;
- debt reduction;
- amateur athletic organizations.

**Link to More Information:** <https://smythccf.org/>

### ***T-Mobile Hometown Grants***

**Grant amount:** Up to US \$50,000

**Applicant type:** ***Government Entity, Nonprofit, Working Professional***

T-Mobile Hometown Grants is a \$25 million, five-year initiative to support the people and organizations who help small towns across America thrive and grow. Hometown Grants are given every quarter to up to 25 small towns. Apply for funding to support a community project of your choice, like revitalizing or repurposing a historic structure, creating a downtown asset or destination, or improving a space where friends and neighbors gather. Projects that add to a sense of place or could lead to further investment are of particular interest. We look forward to learning more about your town and your project.

The T-Mobile Hometown Grants program funds projects to build, rebuild, or refresh community spaces that help foster local connections in your town. Projects should be shovel-ready, physical builds or improvements that can be completed within 12 months of receiving Hometown Grants funding. Examples of eligible projects include but are not limited to: adaptive uses of older and historic buildings into community gathering spaces, improvements to outdoor parks or trails, and technology projects for the public library.

Grants are up to \$50k per town. Applications will be open on a quarterly basis. Portal will close on the last day of each quarter and reopen for the new quarter on the first of the month. All Hometown Grant applications will be notified 30-60 days after the end of each quarter on the status of the submission.

**Link to More Information:** <https://www.t-mobile.com/brand/hometown-grants>

### ***Virginia Historical Society Commonwealth History Fund***

**Grant amount:** Varies

**Applicant type:** Government Entity, Nonprofit, Indigenous Group

The Commonwealth History Fund (Fund) was established by the Virginia Museum of History & Culture to support and encourage meaningful history education and preservation projects throughout the Commonwealth of Virginia. Made possible by generous funding from Dominion Energy and others, the Fund is designed to provide grants of approximately \$400,000 per year and nearly \$2,000,000 overall in its first five years of operation. The Commonwealth History Fund is a restricted fund owned and managed by the Virginia Museum of History & Culture (VMHC) and is facilitated in partnership with the Virginia Department of Historic Resources (VDHR).

Eligible projects/activities include, but are not limited to:

- Restoration, rehabilitation and other related building and construction projects,
- Preservation projects,
- Research and documentation,
- Publications,
- Acquisition of property, land, and objects,
- Conservation,
- Landscape or infrastructure improvements,
- Project planning, educational programs and outreach,
- Digitization and website projects.
- The project must begin within 6 months of the awarding of the grant.

***Link to More Information:***

[https://virginiahistory.org/sites/default/files/VMHC\\_The%20Commonwealth%20History%20Fund%20Program%20Guidelines\\_FY2026.pdf](https://virginiahistory.org/sites/default/files/VMHC_The%20Commonwealth%20History%20Fund%20Program%20Guidelines_FY2026.pdf)

*Virginia Land Conservation Foundation Grants*

**Grant amount:** More than US \$10,000

**Applicant type:** Government Entity, Nonprofit, Indigenous Group

Since 1999, the Virginia Land Conservation Foundation (Foundation or VLCF), established under Va. Code §§ 10.1-1017 through 10.1-1026, has funded land conservation projects throughout the Commonwealth. The Foundation administers, manages, and holds competitive grant rounds from a special, non-reverting fund in the state treasury known as the Virginia Land Conservation Fund, Va. Code § 10.1-1020 (Fund).

The Foundation administers the Fund for the purpose of providing grants to state agencies, other public bodies, qualifying nonprofits and state-recognized and federally recognized Virginia Indian Tribes. The grant funds can be used for the costs associated with permanently conserving land throughout the Commonwealth, including the purchase of development rights. VLCF grants are awarded only for acquiring interests in property that have not yet been permanently protected. There are five grant categories set out in Va. Code § 10.1-1020 (D): farmland preservation; forestland conservation; historic area preservation; natural area protection; and open spaces and parks.

**Link to More Information:** [FY26 Grant Manual](#)

*Virginia Tourism Corporation (VTC) Grant Opportunities*

**Grant amount:** Varies by grant

**Applicant type:** Varies by type

**VA250 Tourism Marketing Program**

This program is a partnership between the VA250 Commission and Virginia Tourism Corporation and is designed to support, promote, and market programming, events, and interpretive signage related to quests for freedom against the backdrop of America’s 250th commemoration. <https://www.vatc.org/vtc-va250-tourism-marketing-program/>

**Marketing Leverage Program**

The Virginia Tourism Corporation is offering these grant funds to spur economic activity and overnight travel across the Commonwealth. This program is designed to create public private partnerships and leverage matching marketing dollars to promote Virginia as a vibrant destination with robust visitor

experiences. <https://www.vatc.org/grants/leverageprogram/>

### **Microbusiness Marketing Leverage Program**

Reimbursable grant program to leverage existing marketing funds. Requires a targeted and research-based marketing plan designed to drive tourism to VA. <https://www.vatc.org/grants/mmlp/>

### **Virginia DMO Marketing Grants**

Who is eligible: Official Virginia DMOs for marketing expenses that show positive and significant economic impact on tourism and must include marketing plans designed to drive visitation to Virginia  
SPRING 2026 Round Opens: Mid-February 2026

How: Online application portal

Award Tier: Up to \$20,000 with minimum 50% cash or in-kind match

Contact: Email [VTCDMOGrant@virginia.org](mailto:VTCDMOGrant@virginia.org)

### **Virginia Special Events and Festivals Program**

Who is eligible: Virginia-based special events and festivals for marketing and production of special events and festivals; special events and festivals must have at least two years of prior attendance since 2017 and must have a minimum attendance of 500 attendees. Special events and festivals with less than 500 attendees should apply for the Marketing Leverage Program.

Important Notes:

\* This round will be for calendar year 2026 events (Events occurring between Jan 1st, 2026, and December 31, 2026).

\* Special events and/or festival must show positive and significant impact on tourism and marketing plan must be designed to drive visitation to Virginia. 50% of award may be spent on event production costs. Applications with plans to use production funding to expand festival capacity; add a stage, enhance visitor experience, add artisan markets, concessions, food trucks, or other revenue generating activities will score higher

Award tiers:

- Tier One: 1,000-4,999 attendees; up to \$5,000 award with minimum 50% cash or in-kind match
- Tier Two: 5,000-19,999 attendees; up to \$10,000 award with minimum 50% cash or in-kind match
- Tier Three: 20,000+ attendees; up to \$20,000 award with minimum 50% cash or in-kind match

Opens: July 22 — Closes: September 11

How: Online application portal

Contact: Email [VTCSEFProgram@virginia.org](mailto:VTCSEFProgram@virginia.org)

### *WGPF: National Register Signage Grant Program*

**Grant amount:** Unspecified amount

**Applicant type:** Government Entity, Indigenous Group, Nonprofit

The National Register of Historic Places is the official list of the Nation's historic places worthy of preservation. More than 93,000 properties are listed in the National Register, representing 1.8 million contributing resources (e.g., buildings, sites, districts, structures, and objects).

When a property or district is placed on the National Register, the designation does not include funding for a plaque or sign. As a result, many do not have any signage. The Pomeroy Foundation bridges this gap by providing grants so public properties & historic districts can commemorate their placement and share this achievement with their community.

**Link to More Information:** <https://www.wgpfoundation.org/history/national-register/>

## Appendix F. Economic Impact Methodology

Based on a sample size of 1,084 people from the Virginia Tourism Corporation (VTC) History Travel Profile, the average travel party size for a History traveler in Virginia is 3.1 people who stay for an average of 3.4 nights, with 68% of trips including a spouse/partner and 42% of trips including children. 93% of trips include leisure activities, with the most common activity (39% of travelers) involving visits with friends / family, followed by touring (22% of travelers). Two thirds of these travelers rely on a hotel or motel for accommodations and more than half (51%) include a historic landmark or site in their trip, with 80% overall including historic places as a special interest activity. The values below in Table F1 include percentages within each category as well as the mean for the traveling party.

<b>Table F1. VTC History Travel Profile – Selected Data (CY 2023)<sup>21</sup></b>		
<b>Average Per Party Expenditures in Virginia by Category of Spending</b>	Lodging	38%
	Transportation within state	12%
	Food & Beverage	23%
	Retail Purchase	15%
	Recreation/sightseeing/entertainment	12%
	<b>Mean</b>	<b>\$959</b>
<b>Number of Nights in the State</b>	1 night	21%
	2 nights	27%
	3-4 nights	27%
	5-6 nights	13%
	7+ nights	11%
	<b>Mean</b>	<b>3.4</b>
<b>Travel Party Size</b>	<b>Mean</b>	<b>3.1</b>
	<b>Adults Mean</b>	<b>2.4</b>
	<b>Children Mean</b>	<b>0.7</b>

Based on these VTC estimates, per person expenditures in each major category are provided in Table F2 below. The means per party have been parsed out per person. There are three traveler types. Type A is the average traveler matching the VTC profile (3.4 nights). Type B is a day visitor. Type C is a special event visitor who will stay an average of 2 nights.

<sup>21</sup> Travel Data and Profiles. (2025). History Travel Profile. *Virginia Tourism Corporation*. <https://vatc.org/research/travel-data-and-profiles/>

<b>Table F2. Estimated Visitor Expenditures Per Trip</b>				
	<b>Per party</b>	<b>A: Per person expenditures (3.4 nights trip)</b>	<b>B: Per person expenditures (day)</b>	<b>C: Per person expenditure (2-day trip)</b>
Lodging	\$364.42	\$117.55	-	\$78.37
Transportation within state	\$115.08	\$37.12	\$10.92	\$24.75
Food & Beverage	\$220.57	\$71.15	\$20.93	\$47.43
Retail Purchase	\$143.85	\$46.40	\$13.65	\$30.94
Recreation/sightseeing/entertainment	\$115.08	\$37.12	\$10.92	\$24.75

Based on these visitor spending estimates and projected visitation numbers, Table F3 provides the total amount of direct expenses expected to be incurred in Smyth County due to the Octagon house by the completion of Phase 2, once the house and grounds are fully restored. The two types of inputs are 1) visitor spending and 2) employment gains. Visitor spending is comprised of different categories of spending, including lodging, retail, etc. and are categorized as “industry output” events. Octagon House employees and independent artisans and photographers are categorized as “industry employee compensation.” These inputs were uploaded into an economic impact modeling software called IMPLAN to estimate the economic benefits to the regional economy, defined by commuting patterns across Smyth, Wythe, Washington, Tazewell, Grayson, and Russell Counties. We used the 2023 economic input-output model (the latest available), with the model reporting the outcomes in 2025 dollars.

<b>Table F3. Economic Impact Model Inputs (Completion of Phases 1 &amp; 2)</b>	
<b>Estimated Total New Visitor Spending (non-local)</b>	
<ul style="list-style-type: none"> <li>General Visitors: 750 day-trip, 250 overnight</li> <li>Event Visitors: 400 day-trip, 100 overnight</li> </ul>	1,500 new visitors
Lodging	\$41,144.19
Transportation within state	\$25,549.07
Food & Beverage	\$48,969.05
Retail Purchase	\$31,936.34
Recreation/sightseeing/entertainment	\$25,549.07
<b>New employees - additional employee salaries</b>	
Executive Director	\$50,000.00
Program Manager	\$40,000.00
Grounds Manager	\$30,000.00
Grounds Assistants (multiple / part-time)	
<ul style="list-style-type: none"> <li>\$20/hr.</li> <li>2,000 hours</li> </ul>	\$40,000.00
<b>Artisan employment</b>	
<ul style="list-style-type: none"> <li>\$200 per class to artisan, \$50 to Octagon House</li> <li>20 classes per year</li> </ul>	\$4,000.00
<b>Photographer using grounds for photos (graduation, headshot, prom, etc.)</b>	
<ul style="list-style-type: none"> <li>\$150 per shoot to photographer, \$50 to Octagon House</li> </ul>	\$4,000.00

<b>Table F3. Economic Impact Model Inputs (Completion of Phases 1 &amp; 2)</b>	
• 20 photo shoots per year	

Table F4 shows the estimated economic effects of this activity.

<b>Table F4. Estimated Annual Economic Impact of the Octagon House by Phase 2</b>				
<b>Impact</b>	<b>Employment</b>	<b>Labor Income</b>	<b>Value Added</b>	<b>Output</b>
Direct	3.18	\$209,939	\$287,354	\$472,861
Indirect	0.65	\$25,567	\$42,773	\$104,188
Induced	0.60	\$26,160	\$58,462	\$97,734
<b>Total</b>	<b>4.43</b>	<b>\$261,666</b>	<b>\$388,589</b>	<b>\$674,784</b>

**Description of Economic Measures:**

- **Employment:** Represents full-time/part-time annual average jobs, where 1 job lasting 12 months equals 2 jobs lasting 6 months each. This counts positions, not necessarily individual people, as one person can hold multiple jobs.
- **Labor Income:** The sum of employee compensation (wages, salaries, benefits, payroll taxes) and proprietor income (payments to self-employed individuals and unincorporated businesses).
- **Value Added:** This measures the contribution to regional Gross Domestic Product (GDP). It represents the difference between total output and the cost of intermediate inputs, encompassing labor income, taxes on production and imports, and other property income.
- **Output:** The total value of production, which equals value added plus intermediate inputs. For most industries, this represents total revenue or sales value.

**Economic Impact Interpretation:**

- **Direct Effects** (3.18 jobs, \$209,939 labor income, \$287,354 value added, \$472,861 output): Direct effects represent the immediate economic activity from an operational Octagon House including the jobs directly employed and the spending directly attributable to the Octagon House. Note that the output is higher than the direct expenditures, due to high margins in the retail and dining space and a good degree of regional economic connectivity.
- **Indirect Effects** (0.65 jobs, \$25,567 labor income, \$42,773 value added, \$104,188 output): These capture the business-to-business transactions that occur when the direct business purchases goods and services from suppliers. This includes the economic activity generated by suppliers, and suppliers of suppliers, throughout the supply chain within the regional economy.
- **Induced Effects** (0.60 jobs, \$26,160 labor income, \$58,462 value added, \$97,734 output): These represent the economic activity generated when workers (both direct and indirect) spend their wages on consumer goods and services in the local economy - things like groceries, housing, healthcare, and entertainment.

**Key Points of Interpretation:**

- **Economic Multiplier Effect:** The total impact (4.43 jobs) is about 39% larger than the direct impact (3.18 jobs), showing a multiplier effect of 1.39.
- **Ripple Effects:** For every direct job created, an additional 0.39 jobs are supported through indirect and induced effects combined.

- **GDP Contribution:** The \$388,589 in total value added represents this activity's contribution to regional GDP.
- **Income Distribution:** About 80% of total labor income (\$209,939 of \$261,666) goes directly to the primary workers, with the remaining 20% distributed among supply chain and induced workers.

The IMPLAN modelling for Phases 3 and 4 used the same method, based on extrapolated VTC visitor spending estimates and projected visitation numbers. Table F5 therefore provides the total amount of direct expenses expected to be incurred in Smyth County due to the Octagon house after the completion of Phase 4, including the addition of a special event venue for weddings and conferences, a dining facility, and a visitors' center.

<b>Table F5. Economic Impact Model Inputs (Completion of Phases 3 &amp; 4)</b>	
<b>Estimated Total New Visitor Spending (non-local)</b>	
<ul style="list-style-type: none"> <li>• General Visitors: 1,125 day-trip, 375 overnight</li> <li>• Event Visitors: 600 day-trip, 150 overnight</li> <li>• Conference or Wedding Visitors: 750 day-trip, 750 overnight</li> </ul>	3,750 new visitors
Lodging	\$120,493.71
Transportation within state	\$65,073.70
Food & Beverage	\$124,724.59
Retail Purchase	\$81,342.13
Recreation/sightseeing/entertainment	\$65,073.70
<b>New employees - additional employee salaries</b>	
Executive Director	\$60,000.00
Program Manager	\$50,000.00
Events Manager	\$40,000.00
Event assistants (multiple / part-time) <ul style="list-style-type: none"> <li>• \$20/hr.</li> <li>• 2,000 hours</li> </ul>	\$40,000.00
Grounds Manager	\$40,000.00
Grounds assistants (multiple / part-time) <ul style="list-style-type: none"> <li>• \$20/hr.</li> <li>• 2,050 hours</li> </ul>	\$41,000.00
Dining Manager (part-time)	\$25,000.00
Dining assistants (multiple / part-time) <ul style="list-style-type: none"> <li>• \$20/hr.</li> <li>• 2000 hours</li> </ul>	\$40,000.00
<b>Event partner employment</b>	
Photographers (weddings) <ul style="list-style-type: none"> <li>• 15 events</li> <li>• \$2,000 per event</li> </ul>	\$30,000.00
Wedding planners <ul style="list-style-type: none"> <li>• 15 events</li> <li>• \$1,000 per event</li> </ul>	\$15,000.00

<b>Table F5. Economic Impact Model Inputs (Completion of Phases 3 &amp; 4)</b>	
Caterers (conferences and weddings) <ul style="list-style-type: none"> <li>• \$40 per person</li> <li>• 30 events</li> <li>• 100 people per event</li> </ul>	\$120,000.00
<b>Artisan/gardener/experience-based entrepreneur employment</b> <ul style="list-style-type: none"> <li>• \$200 per class to artisan, \$50 to Octagon House</li> <li>• 32 classes per year</li> </ul>	\$8,000.00
<b>Photographer using grounds for photos (graduation, headshot, prom, etc.)</b> <ul style="list-style-type: none"> <li>• \$150 per shoot to photographer, \$50 to Octagon House</li> <li>• 40 photo shoots per year</li> </ul>	\$8,000.00

The resulting annual economic impact after Phase 4 is complete is projected to be \$1,585,603 (Table F6).

<b>Table F6. Estimated Annual Economic Impact by Phase 4</b>				
<b>Impact</b>	<b>Employment</b>	<b>Labor Income</b>	<b>Value Added</b>	<b>Output</b>
Direct	8.32	\$482,902	\$679,258	\$1,119,939
Indirect	1.51	\$59,947	\$99,413	\$239,935
Induced	1.39	\$60,419	\$135,026	\$225,728
<b>Total</b>	<b>11.22</b>	<b>\$603,267</b>	<b>\$913,698</b>	<b>\$1,585,603</b>

**Economic Impact Interpretation:**

- **Direct Effects** (8.32 jobs, \$482,902 labor income, \$679,258 value added, \$1,119,939 output): Direct effects represent the immediate economic activity from the expanded project through Phase 4, including the jobs directly employed and the spending directly attributable to an operational Octagon House with the extended programming and services.
- **Indirect Effects** (1.51 jobs, \$59,947 labor income, \$99,413 value added, \$239,935 output): Indirect effects capture the business-to-business transactions that occur when the direct business purchases goods and services from suppliers. This includes the economic activity generated by suppliers, and suppliers of suppliers, throughout the supply chain within the local economy.
- **Induced Effects** (1.39 jobs, \$60,419 labor income, \$135,026 value added, \$225,728 output): Induced effects represent the economic activity generated when workers (both direct and indirect) spend their wages on consumer goods and services in the local economy - things like groceries, housing, healthcare, and entertainment.

**Key Points of Interpretation:**

- **Economic Multiplier Effect:** The total impact (11.22 jobs) is about 35% larger than the direct impact (8.32 jobs), showing a multiplier effect of 1.35.
- **Ripple Effects:** For every direct job created, an additional 0.35 jobs are supported through indirect and induced effects combined.
- **GDP Contribution:** The \$913,698 in total value added represents this activity's contribution to regional GDP.
- **Income Distribution:** About 80% of total labor income (\$482,902 of \$603,267) goes directly

to the primary workers, with the remaining 20% distributed among supply chain and induced workers.

- **Project Growth Impact:** Compared to Phases 1-2, the completion of Phases 3-4 has resulted in:
  - 2.6x increase in direct employment (from 3.18 to 8.32 jobs)
  - 2.5x increase in total employment (from 4.43 to 11.22 jobs)
  - 2.4x increase in total output (from \$674,784 to \$1,585,603)
  - 2.4x increase in GDP contribution (from \$388,589 to \$913,698 in value added)
- **Slightly Lower Multiplier:** The employment multiplier effect is slightly lower in Phase 4 (1.35) compared to Phases 1-2 (1.39), suggesting the additional phases may have a somewhat more concentrated direct employment impact relative to spillover effects.

This analysis demonstrates how the project's expansion through Phase 4 more than doubles the economic impact while maintaining strong multiplier effects throughout the local economy.