

National Park Service  
U.S. Department of the Interior



Keweenaw  
National Historical Park

# Core Operations Report 2008-2012

*December 2008*



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**Keweenaw NHP  
Core Operations Report 2008-2012  
December 2008**

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Prepared by the Staff of Keweenaw National Historical Park

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## Introduction

*Core Operations Analysis* is a process designed to assist managers of National Park Service units in making fully informed decisions on staffing and funding alternatives. Parks are asked to identify the work and associated organizational structure required to fulfill the legislative purpose of the park. Secondly, they are asked to make budget predictions for the next five years based on historic budget data from the previous five years. The final step is to correlate that projected budget with the organizational structure. In an era marked by the declining purchasing power of park budgets, the gap between the organizational structure necessary to fulfill the park purpose and available funds is growing larger each year.

The *Core Operations Analysis* (CORE) process assumes that the best people for thinking through the park issues are those closest to the park—its employees. At Keweenaw National Historical Park, the process started with a workshop in February 2008 that involved all park staff. Also participating as part of the CORE team were representatives from the Keweenaw National Historical Park Advisory Commission. From there, park staff and commissioners remained involved in refining the recommendations drafted at the workshop into a draft plan. A review of the draft plan was undertaken by the Midwest Regional Office and resulting recommendations have been incorporated into the final plan presented here.

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# Keweenaw National Historical Park Background

## Park Partnership Structure

Keweenaw National Historical Park<sup>1</sup> is situated on the roughly 100-mile long Keweenaw Peninsula on Michigan's Upper Peninsula. The nascent park is essentially a hybrid of a traditional historical park and a national heritage corridor in that its enabling legislation established a preservation and interpretation purpose both inside and outside its official boundaries<sup>2</sup>. That legislation also established a permanent advisory/operating commission with its own authority (but not with its own dedicated appropriation) to develop and administer programs in support of the park purpose. Together, the NPS and commission operate as an umbrella and coordinating organization for other formal and informal partners (see figure 1 below), in a sense providing professional and technical services for more than 20 "districts" as they might be considered in more traditional parks. The park, as is common among historical parks, also blends typical national park resources, programs, and facilities with the common public history site functions of collection, research, and education.

The National Park Service (NPS/KEWE) directly manages two units – Calumet and Quincy – 12 miles apart, and also, with the Keweenaw NHP Advisory Commission, administers partnership programs scattered along the length of the Keweenaw Peninsula, the largest being the Keweenaw Heritage Site program with 19 affiliated sites. These sites, though fewer in number and then called "Cooperating Sites,"

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<sup>1</sup> Definitions (and acronyms) used from this point forward in this report include:

"Keweenaw National Historical Park (KNHP), or simply, the park, is the partnership of NPS-managed units, KNHP Advisory Commission operations (e.g., grant, technical assistance, educational or cultural resource programs), Keweenaw Heritage Sites, historic districts within official NPS boundaries, and other affiliated copper-related historic sites, districts, and programs serving park purposes inside or outside NPS boundaries.

"NPS or KEWE: operations of the National Park Service at KNHP and those sites preserved, managed, or operated directly by the National Park Service; also NPS administration at KNHP

"KNHP Advisory Commission or Advisory Commission (KAC): the legislatively designated partner of KEWE with three authorized functions: advising the NPS on certain matters related to the management and administration of KEWE and KNHP; operations of cultural programs inside or outside of official NPS boundaries; and fundraising for park purposes.

"Keweenaw Heritage Sites (KHS) are those cultural organizations or sites contributing to park purposes and officially designated by the NPS and the KAC; each site is accessible by park constituents via regularly scheduled hours of operations. This title is also used at times to describe the predecessor of this program, the KNHP Cooperating Sites program.

"Other partners" refers to a) those property owners or program providers who have entered into formal agreements with KEWE or the KAC, such as historic districts commissions or "Main Street" programs, and b) informally, owners of historic properties, local governments, and others who maintain, manage, or interpret park-related historic properties, or potentially do so, to the benefit of park purposes.

"ONPS is a budget acronym for the "Operations of the National Park Service." ONPS funds are those that an NPS unit receives on a recurring basis and do not include directed project funds such as cyclic maintenance, fee enhancement, or line item construction funds, which can fluctuate widely year to year and generally cannot be used to fund permanent employees or programs.

"FTE is an acronym for "full time equivalent," and is used to quantify in one figure the amount of staffing available to an NPS unit. In actuality, it can include full-time, part-time, seasonal, or subject-to-furlough employees. It measures years of work, not actual employees, available to a unit.

"ONPS refers to KNHP's 1998 *General Management Plan and Environmental Impact Statement*, and its Record of Decision.

<sup>2</sup> Public Law 102-543; Section 1(b), Purposes: "to preserve the nationally significant historical and cultural sites... of a portion of the Keweenaw Peninsula [and] to interpret the historic synergism [of ] forces that relate the story of copper on the Keweenaw Peninsula" [i.e., not a portion]; Section 9(a)(7), Keweenaw NHP Advisory Commission: "authorized to carry out historical, educational, or cultural programs which encourage or enhance appreciation of the historic resources in the park, *surrounding areas, and on the Keweenaw Peninsula* [emphasis added]."

contributed \$35,000,000 towards the purpose of this national park in the first ten years of its existence.<sup>3</sup> Within the NPS units, the NPS owns only six historic structures (out of 735) and 134 acres of land (out of 1870); various partners manage additional historic sites and districts, with varying levels of preservation, interpretation, access, and financial resources. But the great majority of historic properties in both units are in private ownership. Of the few NPS-owned historic buildings, four are in the Calumet Unit: one was recently rehabilitated for use as NPS and advisory commission headquarters, another is well preserved and utilized for museum collection storage and access, a third – an industrial scale warehouse – is planned to be an NPS multi-park collection management facility, and a fourth is being developed as the NPS's first interpretive facility in the park. The NPS also leases from a local government a portion of a modern building in the unit as a maintenance facility. In the Quincy Unit, the NPS leases a historic building to not-for-profit organizations and has recently acquired a property that contains a small historic building that is in poor condition.

**NOTE: While the name of Keweenaw National Historical Park incorporates the entire preservation and operations structure of the park partnership, the analysis, goals, issues, data, and the budget and staffing recommendations included in this core operations analysis report, unless stated otherwise, relate only to the administration of NPS programs and operations. This allows this report to follow the guidelines for the core operations analysis program and to be used in comparison with similar reports from other NPS units. Where appropriate, recommendations may also be included for the KNHP Advisory Commission.**

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<sup>3</sup> This figure was captured in a one-time exercise examining the operating expenses of the sites during this period. This data is not collected on any recurring basis, and individual site data for some sites is proprietary.



**Figure 1.** Keweenaw NHP can be visualized with the NPS and KNHP Advisory Commission as an umbrella organization administering the collaborative operations of the NPS, the commission the Keweenaw Heritage Sites, and other partners.

## Organization and Previous Analysis

The Keweenaw National Historical Park management team consists of the superintendent and four division chiefs, the management assistant, and two specialists from the Preservation Services Division (PSD). The Chief of Administration position is shared with, and is filled by the Assistant Superintendent/Administrative Officer at, Isle Royale National Park (ISRO). The other three divisions are: Interpretation and Education; Preservation Services; and Museum, Archives, and History. This structure has been in place since 2000. Since 2007, each division chief (or, for MAH, acting chief) directly supervises all permanent employees within the division, and some divisions have leads who supervise seasonal personnel.

**FTE** – Since 2003, NPS FTE funded from base ONPS funds has ranged from 12 to 16. The most significant change over these five years occurred in 2004, when shared ISRO FTEs were first charged to KEWE.

**Recent Management Reviews** – In 2000, as part of a partnership initiative of the National Park Service and the National Parks Conservation Association, a business plan was developed for KEWE. This plan was to provide a comprehensive financial blueprint for the future development of the NPS program. Research

for the plan found that from 1994 to 1999 only 53% of NPS expenditures went towards personal services and benefits. The analysis noted that:

An additional factor that is extremely important to understand is the assistance to cooperating sites. By its mandate, Keweenaw NHP is a cooperating park; thus numerous private, public, and non-profit attractions collaborate with the park. Part of the collaboration includes receiving funding from the park for the improvement of programs, structures, and collections. Almost a sixth of the total expenditures of the park have gone to providing direct assistance to its cooperating sites.

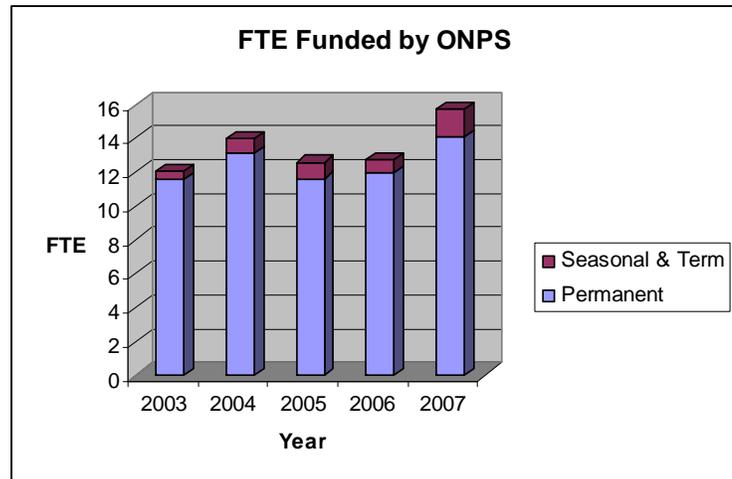


Figure 2: Funded FTE Summary

Since the business plan was written, the number of cooperating sites, now “Keweenaw Heritage Sites,” has grown by nearly 20%.

This plan cemented the four-division organization of KEWE, at the time labeling them: cultural resources, interpretation/visitor services, museum/archives/history, and management/administration. In fiscal year 2000 dollars, the plan established the need for an annual appropriation of \$2.7 million in order to operate at standards set by the NPS, Congress, and KEWE. The plan projected a need of 29 FTE by 2005. It recognized the need for both staffing and funding (\$400,000 annually) to continue assistance to park partners, such as exhibit, interpretation, and education program development and the preservation, protection, and maintenance of historic structures and artifacts. An additional \$100,000 (the maximum allowed by enabling legislation) was prescribed for the operation of the advisory commission. The plan also prescribed the development of NPS facilities and programs, as called for in the 1998 GMP. The plan described this rare construct at KEWE:

Rather than striving to secure funding sources other than those appropriated monies laid out in its enabling legislation, the park seeks to assist its partners and cooperating sites in leveraging funding. Thus funding for the park funnels in and out of the park through both Federal and non-Federal channels, providing for a diverse base of monies to develop and operate sites that tell the story of copper mining on the Keweenaw Peninsula.

More recent management reviews of KEWE staffing were undertaken between March 2004 and April 2006 as part of the MWR’s *Living Within Our Means* initiative. A target organization chart reflecting future needs was approved by the MWR Director in March 2005, and again in April 2006. During these reviews, it was acknowledged that KEWE is a young park and has a strong partnership management component to its operations. As a new park, it was expected that NPS operational programs would grow. The organization chart approved on April 21, 2006, is attached as appendix 1.

This approved 2006 organization chart documented existing positions, positions proposed in existing OFS requests, generally proposed positions, and positions expected to be increased in grade as operations and

partner coordination duties grew. If fully implemented, this organization would lead to KEWE ONPS-funded FTE increasing from 16 in 2007 to approximately 35 including seasonal FTE. One key characteristic of the April 2006 organization is the transfer of supervisory responsibility for administrative positions from KEWE to ISRO, with the expectation that the two neighboring NPS units develop a more integrated administrative function.

Discussions related to the administrative function at KEWE and ISRO have been intermittently occurring since at least 2000. From the park's inception, the Isle Royale Administrative Officer and staff served many of KEWE's administrative needs. Seven years ago KEWE hired its own Administrative Officer, but ISRO has provided contracting and human resources support continuously since the park was established. When KEWE's AO position was vacated, ISRO's AO/Assistant Superintendent was reassigned its AO duties. Additionally, KEWE has a Budget Analyst on staff and an Administrative Technician to provide budgetary and miscellaneous on-site administrative services.

**Average Grade** – KEWE's average grade is significantly higher than that of most NPS units, including units with similar FTE and of similar age. Because of KEWE's initial focus on the provision of technical assistance rather than the conducting of field operations, most non-administrative positions are at the professional journeyman level (GS-11 and above). As KEWE enters into the realm of NPS operations the average grade is expected to decrease. However, this will not happen quickly and, ultimately, is not likely to match the NPS average due to the continued responsibility to provide professional-level technical assistance to partners as a routine part of NPS operations. Traditional NPS methods of measuring average grade level will continue to result in above-average measures as these methods cannot count the very high number of partner staff and volunteers who carry out park programs at the field level and to whom the NPS staff provides professional services.

**FTE and Supervisory Ratio** – Analysis resulting from the February 2008 Core Operations Analysis Workshop found an unusual parkwide NPS supervisor-to-subordinate ratio of 1 to 1.7. Industrial standards suggest a 1:10 to 1:15 ratio as appropriate, depending on the work supervised. A factor not considered in this KEWE analysis is the number of seasonal, temporary, intern, and volunteer positions supervised, and of course, as is typical in this kind of analysis in the NPS, the diversity of professional work besides supervision required of a supervisor, e.g., technical assistance, NPS program development, etc. Another factor not considered was the minimal financial impact of this supervisory ratio; for two KEWE supervisors who supervise employees at their own grade, the only significant financial impact is the cost of required supervisory training. Because of the wide diversity of specialized professional staff among the very small number of employees at KEWE, a more appropriate measure might be the number of levels of supervision: Superintendent > Division Chiefs > to two field leads. Nonetheless, the analysis illustrates that KEWE might benefit from further analysis of supervisory positions to determine if further efficiencies can be found.

## Part 1. Definition of Core Program

### Park Purpose

In February 2008 KEWE staff and participants from the park's advisory commission developed, during a *Core Operations Analysis* (CORE) workshop, the newest iteration of a park purpose statement, based on the federal role identified in the park's enabling legislation and other fundamental direction:

The purpose of the Keweenaw National Historical Park is for the National Park Service and the Keweenaw National Historical Park Advisory Commission to preserve and interpret the resources and stories of the nationally significant history of copper on the Keweenaw Peninsula.

Because the vast majority of historic and archeological resources related to the Keweenaw copper story are located in areas not owned by the NPS, the NPS and the advisory commission must manage these through agreements, assistance programs, partnerships, consultation, and advocacy. While a more traditional NPS unit established in a different economic climate might acquire many of the historic properties operated by partners here, KEWE must fulfill its mission by assisting partners in the protection and interpretation of these resources critical to the understanding of the park story. In partnership, the NPS is spared the expense of daily operations (saving more than \$3.5 million each year<sup>4</sup>), but must, with the commission, at a minimum provide technical guidance and some financial assistance to ensure that visitors encounter a high quality national park experience today and in the future. The 2000 KEWE Business Plan describes the benefit of this model:

The unique partnership design of Keweenaw NHP means that much of the operating burden of the park's attractions falls upon non-profit, private and state government entities. If the National Park Service were to purchase and maintain many of the cooperating sites, the park's operating and maintenance costs would radically increase. The design of the park allows for minimal federal investment and greater local participation.<sup>5</sup>

However, until a sustained level of resource protection and interpretation as well as a sustained source of revenue are developed for the advisory commission and other park partners, the responsibility of protecting the resources that qualify the Keweenaw Peninsula for national park status falls squarely on the shoulders of the NPS.

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<sup>4</sup> See footnote 3

<sup>5</sup> KNHP 2000 *Business Plan*, page 33

## KEWE Priorities and Goals

During the February CORE workshop, participants developed a list of NPS priorities – those activities deemed the most necessary to meet the park purpose. The top priorities are listed as they were prioritized by the workshop participants and they often overlap:

### Priorities

1. Develop a cohesive and comprehensive national park experience along the length of the Keweenaw Peninsula.
2. Inventory, document and prioritize copper related resources, e.g., structures, landscapes, natural features, archeological sites, objects, etc.
3. Assist community in the development of land use planning, historic district ordinances, and national register nominations.
4. Develop a visitor center in Quincy Unit and orientation facilities in Calumet Unit that provide an overview of the park's organizational structure as well as the copper story.
5. Develop a consistent, high quality visitor experience for the network of heritage sites.
6. Create a quality visitor experience that provides visitor contact and orientation to the park, partners, and other sites; provides access to park themes and stories through multiple means including guided programs, exhibits, publications, and other appropriate media; and provides wayfinding signage, universal accessibility, and a high degree of visitor safety.
7. Expand preservation and interpretation capabilities of partners through financial grant programs and increased technical assistance.
8. Preserve copper-related resources on the Keweenaw Peninsula based on prioritization.

This workshop process clearly recognized the gaps in present programming as these priorities focus on new programs rather than sustaining existing programs. In a lengthier, more useful process, KEWE managers in November of 2007 developed a set of challenging long-term goals determined to be critical in fulfilling the park purpose. Fulfillment strategies were also suggested, and are included as appendix 2. The goals have since been reviewed by all NPS employees, the Keweenaw NHP Advisory Commission, and the nineteen Keweenaw Heritage Sites and other key park partners; they were finalized in March 2008. The KNHP Advisory Commission has also been developing complementary goals, included in their most recent iteration as appendix 3.

### KEWE Long-term Goals

#### *Partnerships and Sustained Operations*

1. By 2017, an organization or network of organizations is well established in raising support for Keweenaw NHP (NPS, advisory commission, and partners) as demonstrated through annual grants and donations (cash, in-kind) equivalent to at least  $\frac{1}{4}$  of the park's appropriated budget and the doubling of the number of volunteers.

2. By 2017, through cooperative efforts, visitors to the Keweenaw Peninsula can easily recognize and interpret cultural landscapes related to copper mining through well preserved and interpreted cultural resources, to the point that 25% of all visitors to the Keweenaw can describe the significance of the park at the conclusion of their visit.

### ***Resource Preservation***

3. By 2017, a strategy for the long-term protection of nationally and regionally significant copper-mining resources on the Keweenaw Peninsula is developed and its implementation initiated, and the Quincy Smelter will be stabilized and interpreted to the public. By 2010, the strategy for NPS units is being implemented.

### ***Visitor Experience***

4. By 2017, visitors can experience a cohesive national park experience along the length of the Keweenaw Peninsula, allowing for easy understanding and selection of routes, sites, programs, recreational opportunities, and activities related to the copper mining story, while recognizing that multiple partners and missions are involved in preservation and interpretation.

5. By 2017, the General Management Plan goal of providing a traditional national park experience is met in the two NPS units of the park through development of a core resource and interpretive experience that anchors the national park and partner sites.

6. By 2017, all NPS and Heritage Site facilities open to the public are accessible, maintain a professional public appearance, are compliant with life-safety code, and foster environmentally sustainable practices.

### ***Education & Interpretation***

7. By 2017, a program is in place that has every student on the Keweenaw Peninsula experiencing at least once in their K-12 schooling an on-site curriculum-based program at the park (including the Keweenaw Heritage Sites).

8. By 2017, visitors year-round may gain an understanding of the park themes through dynamic and diverse interpretive opportunities at NPS facilities, including an interpretive experience in every NPS-occupied building and on NPS-owned properties. Partner sites will be approaching a similar result in interpretive media and programming.

### ***Public History***

9. By 2017, Keweenaw NHP is nationally recognized and frequently sought out as a prominent and accessible source of copper mining history through museum collections, research, and interpretation.

### ***Employee Diversity***

10. By 2017, NPS seasonal employees at Keweenaw NHP will reflect the diversity of the regional universities through development of sustained recruitment programs and training opportunities.

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## Needs and Emerging Issues

The priorities and long-term goals have been developed largely in response to identified needs and emerging issues. Some of the needs were identified as early as the 1998 General Management Plan (GMP); others continue to arise and develop, particularly due to the structure of the park that is hugely dependent on formal and informal partnerships.

### **Financial Resource-related Issues and Needs:**

#### ***Competing Demands for NPS Operations and Partner Assistance***

The GMP prescribed a dual-staged program for KEWE: the development of partnership and assistance programs followed by the development of KEWE's own programs and facilities. With the establishment of the Keweenaw Heritage Sites program, recent strengthening of the advisory commission, sustained technical assistance programs, opportunistic financial assistance distribution, and the acquisition of six historic buildings, KEWE has now begun to focus much more on the second stage, its own programs, but without the benefit of any substantive increase in operating budget. Thus the transition to NPS operations must come at the cost of sustained assistance to the numerous park partners. Additional resources would sustain both assistance and operations programs.

#### ***Principal Park Partner Requires Consistent Funding for Sustainable Partnership***

The Keweenaw NHP Advisory Commission was authorized operational authority in the park's enabling legislation with the expectation that the commission would foster preservation and interpretation of copper-related resources outside the formal NPS boundary<sup>6</sup>. No consistent funding has been available to the advisory commission, and so far its operational impact has been mostly limited to the development, with NPS staff, of the Keweenaw Heritage Sites program. Lack of funding prohibits sustained support of these heritage site partners and the development of the commission's own programs, limiting most park benefits to historic properties inside the boundary contrary to the intent of park legislation. Additional dedicated resources, up to the limit established in legislation, would implement and sustain commission operations and assistance programs.

#### ***Preservation and Interpretation Challenges***

Even after fifteen years of developing partnerships and several years initiating steps to provide the high quality of preservation and visitor experiences that constituents expect to find in their national parks, partner organizations remain diverse in their abilities, staffing, and funding, all of which are reflected in a diversity of preservation and visitor services capabilities. Of the 19 Keweenaw Heritage Sites, 16 manage historic structures and landscapes, and all provide interpretive services. Of these sites, only the two Michigan state parks have access within their organization to preservation professionals and interpretation/education planners. Additional partners, e.g., the historic district commissions and private property owners within the NPS units, also manage historic properties to the benefit of the park. Until the advisory commission is poised to offer technical assistance in these arenas, NPS staff serves as the primary consultants for preservation and visitor services, interpretation, and education planning both inside and outside NPS boundaries. However, the greatly increasing demand for these services, and the oversight of NPS-funded and other stabilization projects for properties within NPS boundaries, greatly exceeds the time available by existing professional staff. In the past two years, as a result of previous successful NPS technical assistance, there has been a marked increase in requests for interpretive assistance, from participation in exhibit planning and leading short- and long- range interpretive planning to the

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<sup>6</sup> Sec 9 (a)(7): [The Commission shall] be authorized to carry out historical, educational, or cultural programs which encourage or enhance appreciation of the historic resources in the park, surrounding areas, and on the Keweenaw Peninsula.

production of media. Additional resources would provide professional individual site and collective exhibit planning, interpretive services training and mentoring, material support for media, historic landscape planning, preservation planning, and preservation maintenance mentoring for these sites, establishing a cohesive professional national park experience for this diverse collection of sites contributing to the park purpose.

### ***Museum Collection Challenges***

Of the park's 19 Keweenaw Heritage Site partners, 15 have collections. Only four of these partner sites employ or have regular access to a professional curator or archivist. Few have adequate exhibit facilities or even collection storage. Beyond these 19 official partners, there are numerous other historic property owners who possess objects or archival materials significant in the understanding of the Keweenaw copper story. The NPS frequently receives requests for assistance in salvaging, conserving, and/or storing objects from these sites. In order to reduce cataloging backlogs and the long-term responsibility of caring for these objects and collections, the NPS has asked the KAC to take custody of copper-related collections lacking strong ties to NPS-owned resources until other repositories are prepared to accept them. However, these are actually curated by NPS staff at NPS facilities, as critical conservation care is required so that these valuable resources are not lost. While these needs have been mostly met with 2007 staffing levels, future collection growth and increased assistance to partners will ultimately require additional resources.

### ***Need for Transparent Financial Assistance Program and Removal of Overly Burdensome Hurdles***

Park legislation authorized (and by that authorization, intended) a financial assistance program to support owners of historic properties in the properties' preservation and interpretation. Much of this assistance, however, requires a hefty match (4 to 1) by the property owner, and in the past only occasional grants were made. This legislation is expected to be amended in 2008, requiring only a 1 to 1 match. Given appropriate funding, this will allow the NPS to finally realize its potential in partnering with both formal and informal (as described in footnote 1) partners within NPS boundaries. However, with the requirement now to support its own operations and infrastructure and to sustain at least a portion of its technical assistance programs, limited (if any) funds are available for financial assistance. In 2008, only \$30,000 was available for grants, and that due only to the lapse of a key management position. Additional resources would sustain a financial assistance program as envisioned in the enabling legislation.

### ***Park Recognition, Interpretation, and Education Enhancement***

After 15 years of existence on the Keweenaw Peninsula, the park is still not a notable presence. Visitors – and local residents, too – are frequently asking “Where’s the Park”? No park or NPS unit entrance signs have been erected, and few wayfinding signs; the only signs developed and installed to date have been small site identifier signs, letting visitors know when they have arrived at a Heritage Site or NPS facility. Ranger presence – a core expectation of visitors to a national park – is limited to seasonal staffing at a makeshift orientation space and five ranger-guided programs each week.

Assistance previously provided to regional schools has led to great teacher involvement in the park and a great demand – and opportunity – for education programs – on site, in schools, and via electronic media. The demand's best potential is in the development of long-term programs that involve students in a sustained relationship with the park.

At this park where a successful mission *requires* extensive local understanding and participation, NPS staff is unable to capitalize on this hugely increasing demand for community programming and curriculum-based education programs and resources, losing opportunities to engage local residents and students (future supporters and voters) in history and historic preservation education. Additional resources would provide an ongoing messaging program and establish ranger programs and educational partnerships,

programs, and resources.

### ***Union Building Exhibit and Quincy Smelter Provides New Opportunities, Costs***

KEWE has received funding for planning and design of rehabilitation and exhibits in the Union Building in the Calumet Unit. Construction and fabrication funding is expected to complete the projects in 2011, creating the NPS's first substantive interpretive facility. Present staffing levels will not allow opening of the facility without the withdrawal of all seasonal staff from the NPS-operated temporary visitor orientation desk in the Quincy Unit (and that only if BCP changes do not eliminate these seasonal positions). Additional resources would allow for the operation of this facility and the Quincy Unit orientation facility and the continued provision of interpretive programming.

One of the premier and iconic Keweenaw historic copper resources is the largely intact 25-acre, 28-building Quincy Smelting Works complex. Owned by a local government, the abandoned national-historic-landmark-district property is deteriorating rapidly. A new opportunity for preservation is opening, as the EPA remediates site contaminants in 2008 and 2009. Stabilization, preservation, and operation of this complex as a historic property potentially will require substantial participation by the NPS. Additional resources could fund a program manager to foster partnership opportunities to reduce that potential.

### ***Poor Local Economy Inhibits Development of Alternative Revenue***

Alternative revenue sources are pursued by the NPS, particularly revenue sharing partnerships and grants (through partners). However, the NPS must be conscious of community needs and the potential for competition for limited income with community partners.<sup>7</sup> Historic leasing, a highly useful preservation tool in some parks, at KEWE would have the NPS competing for tenants with private and partner owners of the numerous vacant historic buildings that the NPS desires to be rehabilitated. Fees for NPS interpretive services also dilute the visitor expenditure potential for partners. While these objections do not absolutely prevent such revenue development, the use of these programs has to be judiciously considered. The local economy also limits the potential for local philanthropy. While there may be some potential in identifying and successfully soliciting funding from regional or national organizations, efforts to date have not been fruitful. As an example of the effect of the economy on philanthropic giving, KEWE has been unable to utilize its granting authority to any significant extent due to the inability of historic property owners and partners to raise the unusually high required match. The advisory commission has also not been successful in its efforts to raise funds for the match required for its federal funding. Anticipated reductions in matching requirements are expected to alleviate but not eliminate this situation.

### ***Lake Superior Parks Collection Management Center***

March 2007 marked the approval and issuance of the NPS' *Park Museum Collection Storage Plan*, representing a Servicewide approach to cost-effective storage of park museum objects through consolidation of park collections into clustered storage facilities. Among the plan's prescriptions for the Midwest Region is the development of a consolidated collection facility at Keweenaw to include the collections of KEWE, ISRO, APIS, and PIRO. The plan specifically calls for upgrading facilities and increasing staff capabilities at KEWE to accommodate these collections in a professional manner. Funding for the rehabilitation of an existing NPS historic structure to house this facility is expected to be funded by

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<sup>7</sup> The KNHP 2000 *Business Plan* identifies this issue as well: "The park lacks a revenue base and it is unlikely to increase, at least in the near future. Since the collapse of the mining economy in the early 1930s, the Keweenaw Peninsula's economy has suffered. Currently, the average annual income is roughly 30% below the national average. For this reason, the park cannot depend heavily on the surrounding community. Conversely, the local community is hoping the national park will provide a stronger base for tourism and help boost the economy. Additionally, visitor fees and donations are collected by cooperating sites. If the park were also to collect fees, visiting multiple attractions would likely be too costly. It is better to ensure that the limited amount of donations support the cooperating sites, since they are a crucial part of the park."

2012. Enhancement of curatorial staffing will be at the same time to coordinate the professional transfer of objects and responsibilities from individual park collections to the Lake Superior Parks Collection Management Center.

### **Other Significant Issues:**

#### ***Traditional NPS Metrics Do Not Fit Park Model***

Some traditional metrics are often utilized in the NPS to compare the effectiveness and programs of various parks, regionally and nationally. Two common means of assessing park programs are not reported by KEWE. KEWE reports no official visitation data due to the small number of visitor contacts made directly by KEWE staff; NPS counting procedures prevent the counting of visitors to most non-NPS-operated facilities. If only the small number of contacts made by NPS staff was reported each year, the figures would not represent the large technical assistance and partnering roles of the park. KEWE also does not conduct the annual visitor surveys common to most parks due to the partnership arrangement and the lack of clarity in the survey questions in distinguishing NPS facilities from other facilities, including those of partners and those simply of park neighbors. Other measures, such as average grade, ratio of volunteers to employees, and labor cost as a percentage of base expenses are all skewed from NPS norms by the partnering model of KNHP.

#### ***Poor Local Economy Inhibits Sustainability of Keweenaw Heritage Sites***

Two not-for-profit Keweenaw Heritage Sites have come to the NPS in the last two years identifying financial situations that would prevent their opening. In the first instance, the NPS and others were able to find temporary solutions to get the site open and initiate long-term planning for funding and/or volunteer development. In the most recent (and continuing) case, short-term funding by others allowed the site to open in 2008, but long-term support is more problematic. A third site expects an upcoming balloon payment to wreak havoc on their operations, potentially forcing a closure. Each of the 12 not-for-profit heritage sites and even some of the government-operated sites, are competing for funding and volunteers in the sparsely populated Keweenaw Peninsula in the midst of a sustained depressed economy. While the 19 Heritage Sites are estimated to expend greater than \$3.5 million each year toward park purposes, not counting in-kind contributions of board members and volunteers, the operations of some of the sites is very fragile and sustained support is in jeopardy.

#### ***Park Resources Require Inventory and Assessment***

A historic resources study of the Keweenaw Peninsula is required to allow the NPS and the KNHP Advisory Commission to make better informed decisions about protection of resources and providing technical and financial assistance. The NPS boundaries have never been finalized, contrary to direction in enabling legislation, due to a lack of full understanding of the extent and significance of copper-related historic resources. Project funds would complete this inventory and assessment of significance.

#### ***Adjacent Development Is Impacting Historic Landscapes***

Primarily in the Quincy Unit and in areas outside the official NPS boundary, there have been over the past ten years a number of potential and actual development schemes with adverse impacts on park resources. It is critical that a greater advocacy role be played by NPS staff and the advisory commission, with routine participation with local governments in planning efforts. Additional resources, particularly for the commission, could lead to increased participation in local government planning.

#### ***Employee Quarters Affect Recruitment and Retention***

Numerous opportunities are available for intern and volunteer assistance in the park. To increase the diversity of NPS staff in the racially monochromatic Keweenaw Peninsula, the recruitment of seasonal



employees from distant regions is required. However, while many homes are available for rent in and near the NPS units, few are furnished, and few of these are available for short-term housing for these volunteers, interns, and seasonal employees. Much, if not most, of what is available is substandard and not conducive to recruiting high quality employees. To take advantage of inexpensive employment alternatives and to successfully recruit diverse employees, the NPS should develop short-term housing opportunities, either through purchase, partnering, or long-term rental agreements. Historic properties within the NPS boundaries are ideally suited to this purpose when restored to meet exterior preservation and interpretation objectives.

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## Core (Essential) Operational Functions

As part of the core operations planning process, the KEWE staff carefully evaluated every significant aspect of NPS operations to determine if it is core, or essential, to fulfilling the purpose of the NPS at KNHP.

The KEWE staff has articulated these core functions to illustrate the requirements for a basic park operation – the functions that must be performed by the NPS (or the KNHP Advisory Commission) to achieve the park purpose and objectives, as described above, and a experience parallel to other units of the national park system for this unique partnership endeavor.

### Core Functions Common to All Work Units

***NPS and Partner Leadership, Program Management, and Supervision:*** management of unit work and employees and volunteers, and the assertive provision of leadership, assistance, advocacy, and project management in partner relationships.

***NPS and Partner Safety and Risk Management:*** assertive management of risk and managing a safe work environment for all park employees, volunteers, and visitors to NPS resources and facilities, and, for some divisions, providing leadership, assistance, and advocacy to partners in the provision of the same.

***NPS and Partner Planning and Environmental Compliance:*** leadership and participation in KNHP-wide planning activities and special initiatives and projects, and completion or coordination of legally required environmental analysis and documentation.

***Internal and External Communications, Meetings, and Correspondence:*** effective and assertive communication with employees, partners, and other stakeholders in the planning, coordination and completion of work.

***Mandatory Training and Administrative Functions:*** complete regionally- and nationally-imposed mandatory training and reporting requirements, and fulfill administrative requirements associated with human resources, procurement and property, budget, travel, cooperative agreements, etc.

***Recruitment and Employee Development:*** engage diverse candidates and local residents and students in KEWE training and employment programs to establish opportunity ladders and diversify employees.

***Partner Training:*** develop, coordinate, and instruct training for formal and informal partners to enhance preservation knowledge and skills and interpretation/education principles, design, and methods.

### Core Management and Administrative Functions

***Leadership, Management, and Supervision:*** provide KNHP-wide leadership, management, and supervision for all NPS functions and partner relationships; lead goal development and KNHP-wide planning efforts and assist partners in long-range planning.

***Advisory Commission Relations:*** maintain relationship with KAC to jointly provide KNHP leadership and collaborative programming, and provide administrative and clerical support to KAC.

***Partner Relations:*** manage and develop partnerships, technical assistance programs, and financial assistance programs; coordinate problem solving for large-scale preservation and coordination issues; develop and manage agreements to meet KNHP objectives; provide managerial-level technical assistance

and support to partners; provide leadership in the development and provision of collaborative programming, and provide assistance in obtaining financial assistance for partners.

**Congressional and Community Relations:** develop and maintain critical relationships with the Federal delegation, state and local elected officials, local governments, and other key stakeholders; monitor land management activities of forty local governments and advocate for preservation districts, regulations, and practices.

**Land Management and Marketing Agency Engagement:** participate in potentially competing or collaborative marketing and heritage tourism programs, e.g., Copper Country Scenic Byway, Western U.P. Heritage Trail, and local and regional CVB and Chamber of Commerce programs.

**Land Protection:** manage NPS lands and buildings including leasing program, develop and implement strategies and partnerships for protection of non-NPS lands in NPS boundaries and (with KAC) of high significance lands outside of NPS boundaries, manage rights-of-way and permits, and assess and plan property acquisitions.

**Public and Media Involvement:** manage relationship with news media and develop and maintain methods of community engagement (KAC has similar role for its operations).

**Administration Coordination:** coordinate with Isle Royale National Park to obtain key administrative functions including human resources management, employee relations, budget coordination, procurement and property management, information technology support, and oversight of other administrative processes.

**Administration:** support ISRO administrative services (coordination and backup for some administrative functions) and manage KEWE-specific function of file administration.

**Grant and Volunteer Development:** develop opportunities for alternative funding for NPS and joint partner projects and operations; assist partners and historic property owners in identifying and obtaining financial assistance; coordinate NPS volunteer program and lead development of a partner-wide volunteer training and development program.

### **Core Resources Management Functions**

**Cultural Resources Inventory and Monitoring:** identify and inventory cultural resources significant to the park story (landscapes, structures, sites); analyze condition and prioritize preservation needs; maintain NPS cultural resources and local GIS databases; monitor development and other activities in and adjacent to KEWE boundaries for potential impacts to resources and threats to salient resources (KAC has similar role outside of boundaries).

**Natural Resources Inventory and Monitoring:** identify biotic and abiotic components of ecosystems and long-term monitoring of select metrics to ensure ecological integrity.

**Cultural Resources Documentation:** research properties within the NPS boundaries to guide preservation treatment: cultural landscape reports, historic structures reports, special history studies.

**Historic Structures Preservation Planning:** develop preservation treatments for each NPS historic

structure; collaborate with partners and assist other historic property owners within NPS boundaries to do the same; provide assistance to the KAC to do the same for salient properties outside boundaries.

**Cultural Landscape Preservation Planning:** collaborate with partners in each KEWE unit to develop preservation treatments for significant cultural landscapes and landscape elements; provide assistance to the KAC to do the same for salient properties outside boundaries.

**Historic Preservation – Structures:** develop strategies and funding and implement preservation treatments for each NPS-owned structure; plan and undertake emergency stabilization treatment where necessary; maintain and repair historic structures to preserve historic integrity. Within KEWE boundaries, collaborate with partners and provide assistance to other historic property owners in the implementation of treatments, and assist in the emergency stabilization of high priority structures. (KAC has similar role for assisting owners of salient properties outside of KEWE boundaries in strategic planning and fund development.)

**Historic Preservation – Landscapes:** collaborate with partners in the development of strategies and funds to implement preservation treatments for each NPS unit; maintain landscapes to preserve historic integrity; advocate for preservation of cultural landscape elements among private property owners and local governments. (KAC has similar role for assisting owners of salient properties outside of KEWE boundaries in strategic planning and fund development and in advocacy.)

**Archeological Preservation:** coordinate or undertake archeological monitoring and documentation for ground-disturbing projects at NPS sites and federally-funded projects within KEWE boundaries; provide or coordinate technical assistance to owners of historic properties in KEWE boundaries for like projects; work with partners to raise archeological preservation awareness.

**Ethnographic Preservation:** inventory and take into account ethnographic resources when planning undertakings; consult with appropriate parties.

**Project Management:** develop specifications and manage contracts for contracted studies and preservation activities.

**Community Engagement:** participate as preservation advocate and in providing technical assistance in local planning activities such as on historic district commissions, on zoning commission boards, in Main Street programs, and at local government meetings.

### **Core Public History Functions**

**Oral History Program:** identify participants in the park story, develop contacts, prepare for and conduct interviews, transcribe and index transcripts; provide technical assistance to partners in developing similar programs.

**Historical Research and Coordination:** identify gaps in understanding of park themes and develop research strategy and study proposals; develop specifications and manage research contracts; perform scholarly primary and secondary research to inform interpretation and exhibit programs.

**Exhibit and Media Development:** inform exhibit and media development projects of NPS and partners.

**Develop Professional Network:** develop network of professional historians and other cultural professionals and university programs as sources expertise and, collaboration; advocate and coordinate involvement in NPS and partner media and exhibit planning.

**Consultation/Oversight:** review NPS exhibit, media, and programs for historical accuracy and potential to enhance with historical data and analysis; assist partners in like activities.

**Access to Historical Resources:** provide public access to research and scholarship via personal presentation/development/coordination of public programs, articles, and exhibits; develop/maintain library and bibliographical references for NPS staff, partners, and the public.

### **Core Museum/Curatorial Functions**

**Museum Services Planning and Oversight:** develop scope of collections statement, storage plans, conservation treatment plans; coordinate collection scope with partners and neighboring and thematically related institutions; assist partners in scope development, storage plans, and conservation treatment strategies.

**Acquisition, Accessioning, Research, and Cataloging:** Research and recommend potential NPS acquisitions or seek alternative repositories among partners; accession objects; research objects and catalog via ANCS; assist partner sites in appropriate documentation methods.

**Curate Archives and Artifacts:** organize, monitor, and treat collections; plan and monitor environmental conditions; and assist partner sites in enhancing conservation and treatment methods.

**Exhibition and Housekeeping:** assist in development of exhibits (subject matter, object selection, acquisition, and research) and manage monitoring, housekeeping, and integrated pest management functions for objects on exhibit and in storage.

**Access to Collections:** process incoming and outgoing loans, develop finding aids to archives and other collections, provide access and assistance to scholarly and other researchers, develop public programs, articles and exhibits; provide assistance to partners and owners of theme-related historic artifacts in preserving salient collections.

**Research:** perform scholarly, technical, and applied research in support of collections, media, and exhibits.

**Potential Museum Functions Core to Manage Regional Repository:** when KEWE becomes a regional museum storage center, as prescribed in the national collection storage plan, it is primarily the depth of functions that will increase rather than the breadth. The greater variety of museum objects will require greater expertise in natural specimen research and conservation methods, and additional technical staffing. The tasks associated with managing this combined collection will be daunting, and the full scope of work is not yet clearly understood. The completion of a collection management plan (PMIS project #131903) for the combined collection will better inform a staffing plan for the facility. (In the meantime, expected minimum requirements have been identified in the target organization.)

### **Core Interpretation and Education Functions**

**Program Management and Coordination:** develop interpretive plans and strategies; coordinate and manage interpretive design projects by staff, contractors, and NPS centers; provide technical assistance to

partners in education and interpretive program development, and interpretive principles and methods; seek opportunities for partnering with educators; coordinate and facilitate interpretive planning, messages, and programming among partners; and develop/implement evaluation practices.

**Media Development and Maintenance:** design, research, write, and develop pre-visit information, KEWE webpage, park newspaper, tours, and other publications; develop, research, write, and produce orientation and interpretive exhibits for NPS spaces, KNHP-wide orientation exhibits for use at all park sites; and temporary exhibits; maintain exhibits and KEWE image file; assist partner sites in the planning, development, and production of interpretive media and exhibits.

**Public Information and Orientation:** operate NPS information desk at headquarters year round and information desk at Quincy partner facility seasonally; by 2011 staff Union Building exhibit facility, and in future years both the Quincy Unit visitor center and Calumet Unit orientation facility; distribute KNHP materials to partner sites annually and brief staff and volunteers; distribute KNHP materials to regional visitor centers; answer public information requests.

**Formal and Informal Interpretation:** provide in-park and outreach guided ranger tours and programs; provide park-wide visitor experiences and leadership to partner sites by rotating programs to partner sites, particularly for the junior ranger program; assist partner sites in development of professional standards among interpreters.

**Community Engagement:** develop, coordinate, and participate in programming aimed at local, regional, and target audiences; engage park neighbors and other constituents in park programming, media and exhibit development, etc.; develop awareness and understanding of local heritage and park purpose and goals; evaluate effectiveness of programming and media.

**Education:** develop curriculum-based programming for NPS units in collaboration with unit partners and assist other partners in their development; develop KNHP-wide pre- and post-visit materials and classroom resources and assist partners in development of site-specific materials; collaborate with educators in the design and presentation of teacher development opportunities and for theme-related community involvement projects with students; coordinate with local and regional universities on the development of programs engaging students in park activities.

**Data Collection:** collect and record visitation statistics KNHP-wide.

**Cooperating Association Coordination:** coordinate sales scope, product development, and operations with cooperating association; serve as liaison to local community to gain support for association sales in a commercial environment.

### **Core Facility Operations and Maintenance Functions:**

**Operate and Maintain NPS Visitor and Administrative Facilities:** maintain and preserve visitor- and staff-use buildings, facilities, and utility systems for optimum performance and to protect from deterioration; manage KEWE facilities including alarm systems, furnishings, utilities, and development and implementation of standard operating procedures; provide technical assistance to partners in designing maintenance programs for historic and visitor facilities; manage facility and maintenance contracts.

**Exhibits, Waysides, and Signs:** repair and maintain NPS and collaborative KNHP-wide exhibits, waysides, and signs to standards and protect from deterioration while providing safe public use; manage KEWE sign program; collaboratively develop KNHP-wide solutions to wayfinding and facility identification; assist sites in the design of landscape-appropriate sign solutions.

**Maintain Road, Parking, and Pedestrian Access:** maintain and repair NPS grounds including parking facilities, unpaved vehicular access ways, and sidewalks and trails to protect integrity and provide safe access, use, and enjoyment.

**Vehicle and Equipment Fleet:** Administer, maintain and repair KEWE vehicles and equipment for safe and dependable use.

**Sustainable Practices:** provide leadership in sustainable development and practices; minimize environmental footprint of maintenance and development activities in NPS-managed activities; demonstrate sound, environmentally conscientious, minimum impact and sustainable practices in daily and long-term actions; provide assistance to partners in the development of sustainable practices.

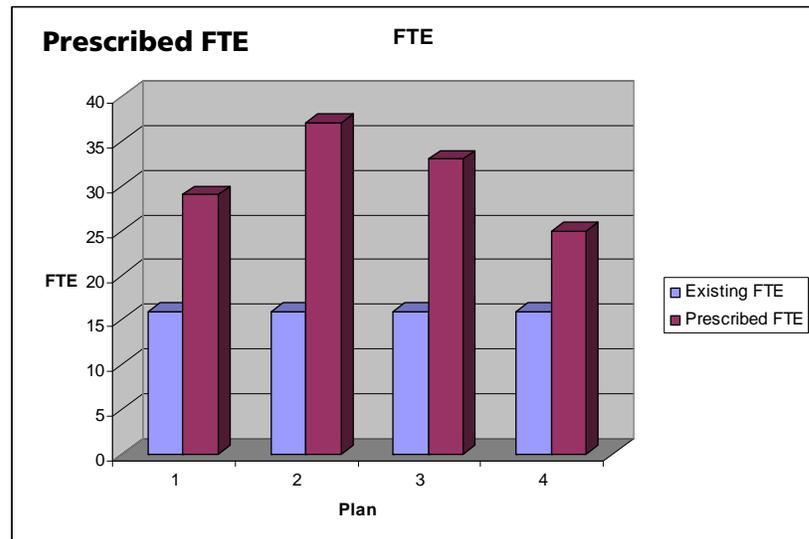
**Manage Safety Program:** manage and coordinate NPS safety program including reporting requirements; assess and assist partner sites in providing safe environments for employees, volunteers, and park visitors.

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## Most Efficient Organization and Staffing Levels Necessary to Achieve Park Purpose and Core Objectives, and to Perform Core Functions

At the February 2008 CORE workshop, participants developed, by division, recommendations for division positions and organizational structures that would allow KEWE and the park to achieve its purpose and meet core objectives, and for KEWE to perform core functions. Following the workshop, and a more careful and holistic analysis of core functions, the KEWE management team developed a comprehensive list of positions required to fulfill the core functions necessary to sustain the integrity of park resources and provide high quality visitor experiences consistent with the NPS Organic Act, NPS Management Policies<sup>8</sup>, and the public's expectations of a unit of the National Park Service. These positions are identified and described below. They represent a total of 33<sup>9</sup> KEWE FTE (plus 4 multi-park FTE), approximately four fewer than the organization approved in the 2006 *Living Within Our Means* [85%] target organization (see appendix 1 and figure 3 below).

KEWE is a nascent unit of the NPS; many new positions are identified as necessary to achieve park purpose. The total FTE identified significantly exceeds the number of positions currently funded. Recognizing that this *Core Operations Report* examines and plans for park operations only through 2012, and that there will be limited opportunities for obtaining new funding for additional positions in the next five years, this list of core positions has been prioritized by park staff. Only the most critical positions have been incorporated into the "Core Operations Target Organization Chart" below, which illustrates KEWE's positions requirements (25.5 FTE) through 2012.<sup>10</sup> Following the Core Operations Target Organization Chart is one that compares that organization to the 2007 baseline, i.e., the current organization (16.5 FTE). Following that is a table identifying prioritized funding packages that fall within the \$500,000 ceiling for individual OFS requests.



**Figure 3** compares current KEWE FTE with FTE prescriptions from recent plans and this report: 1) 2000 Business Plan, 29 FTE, 2) 2005/2006 MWR-approved *Living Within Our Means* organization, 37, 3) 2008 Core Report long-term prescription, 33, and 4) Core Plan 2012 target, 26

<sup>8</sup> The 2006 *NPS Management Policies* specifically discusses partnerships in the contexts of general park management requirements inside and outside of park boundaries (e.g., paragraphs 1.6 and 1.10), land protection (3.1, 3.3), cultural resources (5.3.5.4.8), and interpretation and education (7.3, 7.3.1.1, 7.4, and 7.6).

<sup>9</sup> A few additional positions are identified as term positions, to be filled for a short period – 1 to 4 years – to complete specific tasks. These positions are not counted in the KEWE FTE as they would be filled temporarily in lieu of other permanent positions, or be filled using project funds.

<sup>10</sup> These prioritized positions reflect the following expected conditions between 2008 and 2012: 1) The Union Building will be open to the public starting in 2011 or 2012; and museum collections and management for the five Lake Superior national parks will be consolidated at KEWE. The prioritization of positions assumes that a visitor center in the Quincy Unit will not be operational by 2012, and that no new partnership at the Quincy Smelting Works requiring staffing will be implemented during the plan's life. If either of these potential projects comes to fruition during the plan's life, a significant change in staffing priorities will be required.

A traditional organization chart relates only to staffing needs, and not financial resources. Critical to the success of the KNHP mission is a sustained and effective KNHP Advisory Commission operation, and a sustained, transparent financial assistance program. This funding should be viewed as non-discretionary funding, i.e., approved and encumbered as if permanent positions. The best way to assure sustained funding for the commission is by the NPS pursuing the permanent funding of the commission via a line item in the NPS budget to replace the directed Congressional spending presently funding its operations (e.g., in the “Other Field Areas and Affiliated Areas” program).

The 2012 target organization assumes a consolidation of KEWE and ISRO administrative functions (including information technology), placed under the supervision of the ISRO Assistant Superintendent/Administrative Officer. Thus, KEWE has excluded an administrative division in its organization (though KEWE will continue to financially support the joint administrative function, continue to budget the cost of some administrative positions, and retain some backup and site-specific administrative functions, e.g., files management).

Staffs at Keweenaw NHP and Isle Royale NHP have discussed multiple means of consolidating work beyond administration in the future. Some are already implemented. Another is represented in the KEWE 2012 target organization: the sharing of an FMSS clerk. KEWE’s natural resource management needs should be able to be accommodated by ISRO employees, and some of ISRO’s interpretive, cultural resources, and other needs may be accomplished by specialists at KEWE. Opportunities will continue to be explored, particularly as each park is seeking funding for the establishment of new NPS positions.

The most efficient organization continues to be heavily weighted in professional positions, necessary for professional expertise required by both NPS and partner managers. The 2012 target organization assumes the development of new visitor facilities in the Calumet unit, but reflects a post-2012 completion date for new NPS-operated facilities in the Quincy Unit.

The target organization also assumes the establishment of the Lake Superior Collection Management Center (LSCMC), but cannot anticipate all of the requirements of managing the combined collection. Because any new positions resulting from the establishment of this center are not directly KEWE’s, and should not be seen as solely or even predominantly a KEWE priority, these positions are identified by a separate color on the “Core Operations Target Organization Chart.”

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## Descriptions of Positions Required to Successfully Perform Core Functions

**Superintendent** – Provides overall leadership to NPS and partners; develops long and short-term goals with partners, priorities, and strategies for accomplishment; coordinates cohesive parkwide activities with Keweenaw Heritage Sites and KNHP Advisory Commission; develops new partnerships; negotiates cooperative agreements; monitors and proactively addresses land-management activities of local governments, and addresses threats to park resources and values; conducts public relations activities with delegation and all constituents to increase awareness of and support for park purpose; manages overall park operations; and identifies and pursues approaches to sustainable operations for park and partners. (1 FTE)

**Management Assistant** – this position assists the Park Manager in the management of partnerships, particularly the Keweenaw Heritage Sites program and the technical aspects of administering the partnership with the KNHP Advisory Commission; researches and develops cooperative agreements and memoranda of understanding; coordinates legal review of KEWE activities; coordinates NEPA compliance activities; develops, coordinates, and administers KEWE's grant-making program; manages leases for and of KEWE facilities; represents the Park Manager at meetings of select partners and provides technical assistance to partners. (1 FTE)

**Historian** – this position is aimed at providing parkwide public-history leadership and the history functions inherent in any historical park; the Historian works in an interdisciplinary fashion to maintain professional standards in historical research, cultural resources management, and interpretation; performs historical research, manages historical research projects, informs and reviews for appropriate historical methodology and accuracy activities related to interpretation, education, and collections; contributes to historical scholarship through publications and exhibits; performs paraprofessional archeology and coordinates park archeological and other Section 106 compliance field activities; serves as principal liaison with Native American organizations; and provides technical assistance to park partners in like activities. (1 FTE)

**Oral History Technician** – this position is required in order to capture the historical perspectives of those personally involved in the history of the Copper Country, to develop contacts and interview strategies with the Historian, conduct interviews, and transcribe, catalog, and index transcripts; the Oral History Technician also provides assistance in these activities to park partners in their oral history programs. (1 new FTE)

**Administrative Assistant** – this position is aimed at assisting the superintendent, advisory commission executive director, community planner, management assistant, and grant writer in repetitive correspondence with partners, scheduling and planning meetings including KEWE and KAC public meetings, tracking correspondence, tracking the meeting schedules of more than 20 local governments and of each of the park partners, tracking cooperative, grant, and lease agreement requirements, maintaining advisory commission records and monitoring commissioner appointments, etc. (1 new FTE)

**Grant Writer** – this position is aimed at developing funding opportunities for NPS, commission, and formal partners (e.g., historic district commissions, Keweenaw Heritage Sites) via the development of relationships with funding organizations, fundraising partners, applications for grants through foundations and state and federal granting organizations, pursuit of appropriations through federal and state agencies, general fundraising campaigns, and the development of multi-partner opportunities. (1 new FTE)

**Community Planner** – this term position is aimed first at developing partnerships for the ownership and operation of the Quincy Smelting Works, a key park resource but one that the NPS is prohibited from owning due to contamination restrictions; second, at pursuing with the NPS and KAC the development of officially designated historic districts and their regulatory commissions and the participation in the activities of local and regional planning and zoning commissions; and, third, coordinating long-term mission-based planning for the KHS and other park partners. (Term – no FTE)

**Chief of Resource Preservation** – this position is required to plan and direct a comprehensive and cohesive cultural resources management program for the park; manage and supervise NPS cultural resource management activities (e.g., research, inventory, monitoring, development of preservation treatments, funding development) including preservation and maintenance of historic structures and cultural landscapes; manages archeological and ethnographic resources; and provides technical assistance to partners on these aspects of historic site management. (1 restored FTE)

**Administrative Positions** – Shared with Isle Royale; 1.5 FTE funded from KEWE. (1.5 FTE)

**Historical Architect** – this position manages the preservation of KEWE historic structures, informs the work of park staff related to historic structures maintenance, develops individual-building and broad-program strategies and treatment approaches for historic structures; develops specifications for preservation work and serves as COR on KEWE and KEWE-funded preservation projects; assists partners as member of design and approval committees in historic districts; and provides technical assistance related to historic preservation to owners of historic properties and partnership preservation organizations in the form of consultation, review, and training. (1 FTE)

**Historical Landscape Architect** – this position manages the study and preservation of the park's broad cultural landscapes, coordinates cultural landscape reports, manages projects for the rehabilitation of historic landscapes, manages the parkwide sign program, and designs development/ landscape features compatible with the cultural landscape; assists partners in like activities. (1 FTE)

**Architectural Historian** – this position is aimed at documenting via historic structures reports and other means NPS-owned and other key historical structures within the NPS boundaries and documentation of national register eligibility for significant properties and districts in and outside the NPS boundaries. (1 new FTE)

**Facility Manager** – This position in the target organization will be responsible for the day-to-day maintenance of park facilities, primarily historic structures and cultural landscapes, but also including the management of custodial and grounds maintenance contracts, signs, and utility systems; management of the FMSS and related facility and asset management programs; the KEWE safety program, fleet, and housing; supervision of field preservation specialists, the FMSS clerk (for KEWE work), laborers, and youth and community work teams; and development of community training programs, coordination of maintenance components of co-sponsored events, and provision of technical assistance to partners and owners of historic properties related to maintenance of historic properties. (1 FTE)

**FMSS Specialist** – this ¼ FTE (KEWE) position is to be jointly established by ISRO and KEWE to manage the increasingly complex and demanding requirements of NPS facility management systems. (0.25 new FTE)

**Exhibit Restoration (Preservation) Specialist** – this position is aimed at planning and undertaking

recurring maintenance needs on NPS facilities and providing technical assistance to partners and other historic property owners in developing strategies and methods for addressing preservation needs. (1 new FTE)

**Project Manager** – this term (and mostly project-funded) position is to manage numerous planned NPS facility preservation and landscape restoration projects, to assist partners in the management of NPS- and commission-funded preservation projects, and to provide technical assistance to partners and other historic property owners as time allows. (Term – no FTE)

**Maintenance Mechanic, Maintenance Worker, and Seasonal Maintenance Workers and Mechanics** – these positions are required to meet the presently deferred and new recurring maintenance requirements of NPS assets, including annual maintenance needs and frequently recurring non-annual needs (e.g., window repair, capping of ruins) on NPS-owned historic structures and on in-park partner historic resources; a seasonal maintenance mechanic will supply different expertise than the STF mechanic, e.g., masonry vs, carpentry. (1 existing and <2 new FTE)

**GIS Specialist** – the GIS specialist will manage cultural and natural resource databases and support cultural resource professionals in identifying, inventorying, and understanding significant cultural and natural resources inside and outside of NPS boundaries. The position is targeted to be filled in cooperation with the Michigan Technological University (MTU) Industrial Archeology program or other university programs. (1 new FTE)

**Division Clerk** – this positions is aimed at reducing the amount of routine, repetitive administrative-oriented work accomplished by higher-graded employees in the LSCMC and Resources Preservation divisions, such as correspondence with partners, processing common requests for assistance and grants, routing requests for information, maintaining time records, etc. (1 new multi-park FTE)

**LSCMC Manager** – this new multi-park position is required to manage the curatorial functions of the NPS's multi-park repository, to manage the scope of NPS collections, accessioning, cataloging, treatment, conservation, and accessibility of collections for research and exhibit. The manager will also be a subject matter expert in the field of natural or cultural history to complement the knowledge of subordinate curator(s). (1 new multi-park FTE)

**Curator** – the museum curator will continue to provide professional care of KEWE's 3330,000-object-and-growing collection, including maintenance of museum standards, collections research, accessioning, cataloging, inventory, access, storage, and monitoring. As the collection expands with the LSCMC, the curator will provide expertise in a field complementing the knowledge of the LSCMC manager for the benefit of the combined collections. (1 FTE)

**Archivist** – this position maintains, accessions, catalogs, provides finding aids for, and assists researchers in the use of the substantial and growing archival collection of mining company records, personal records, commercial records, and many photographs illuminating the park story. As the LSCMC comes on line, the archivist will do the same for the documents in other park collections. (1 FTE)

**Museum and Archival Technicians** – these two new and one partially restored positions are required to provide curatorial housekeeping, reduce the KEWE cataloging backlog (330,000 objects), organize and create finding aids for archives, assist researchers in the archives and library, and conduct similar activities for an, as yet, unknown number of objects and archives from the other parks whose collections will be

stored at the LSCMC. One or more of these positions will be targeted to be filled in cooperation with MTU Industrial Archeology program or other university programs. And the positions, as a collateral duty, will provide the staffing necessary to securely provide public access to the Keweenaw History Center, its library, and its exhibits. (0.5 existing FTE, restored 0.5 FTE, 1-0.75 new multi-park FTE)

**Chief of Interpretation and Education** – the division chief develops and sustains parkwide interpretive planning, media development, evaluation, educational planning, and cohesive programming in these fields among the park facilities and those of the Keweenaw Heritage Sites and other informal partners. The I&E Chief also identifies opportunities to engage in regional and national programs and expand constituency beyond traditional visitors, develops programs that engage local residents in park management, operations, and programs, and assists partners in the development of interpretive expertise. (1 FTE)

**Training and Volunteer Coordinator** – this position is designed to manage the KEWE volunteer program and coordinate training, most particularly to provide interpretive skills and volunteer training and coaching to partners and NPS staff; provide technical assistance to partners concerning volunteer issues such as recruitment, program management, and training; and design and implement a park/partner-wide volunteer recruitment program. (1 new FTE)

**Education Specialist (Program Manager)** – this position is required to manage the KEWE education program and develop and coordinate a collaborative NPS and partner program between the NPS, local schools, and partner sites. The manager also would provide: technical assistance and training to partner sites regarding education programming; grant research, writing, and coordination; curriculum development; educator workshop development and hosting; training of NPS and partner staff to conduct education programs; coordination of education activities among KEWE I&E staff; and supervision and management of the Teacher-to-Ranger-to-Teacher program. (1 new FTE)

**Teacher-to-Ranger-to-Teacher** – positions are designed for local educators to be detailed to KEWE for eight weeks. Projects are designed to integrate teachers into park operations, establish long-term connections with educators, and advance education objectives as determined by the needs of KEWE and partners and the skills, expertise, and interests of the educator. (Detailed positions; no FTE)

**Interpretive Media Specialist** – this position is targeted at the creation, review, installation, and distribution of all KEWE-produced media and exhibits, a principal means of providing technical assistance to partners to enhance or develop first-time exhibits at partner sites; providing technical assistance, training, and coaching to partner sites that specifically relates to interpretation and education media, including interior and exterior interpretive exhibits, publications, wayside exhibits, education curriculum, electronic media, and web pages. (1 new FTE)

**Supervisory Interpreter** – existing GS-11 unit supervisor position is redesigned as the assistant to the division chief and manages all front line NPS interpretation operations: all NPS visitor and orientation facilities, interpretive programming and community outreach, and the development of short-term interpretation goals and objectives. (1 FTE)

**Visitor Use Assistant/Park Guide** – existing GS-5 administrative clerk position is reoriented at primarily visitor services and management of visitor reception desk in park headquarters; on-site administration of cooperating association sales; presentation of some established visitor programs; and assistance to division managers, reducing the amount of routine, repetitive administrative-oriented work accomplished by higher-graded employees, such as correspondence with partners, coordinating aspects of the junior ranger

program and other established programs, gathering and maintaining statistics for park and partners, and fulfilling requests for information. As collateral duties, provides administrative support to KEWE and ISRO as backup or KEWE coordinator and manages the park's file system. (1 FTE)

**Unit Interpretive and Education Specialists** – these two positions would carry out interpretive operations in each unit: visitor facilities, programs and supervision of the Visitor Use Assistants/Park Guides; also provide education programs during the school year and assist with curriculum research, development, and the implementation of education grants; would work directly with unit partners to facilitate cohesive operations and visitor experiences and undertake joint interpretive and education programs. (2 new FTE)

**Park Rangers (I)** – these positions are developmental rangers (GS-5/7/9) that provide interpretive programs within KEWE and at partnership locations. They also engage visitors and park neighbors in NPS and park programs at community events, and provide special event programming and coordination within the four county (Houghton, Keweenaw, Baraga, and Ontonagon) area. (1-0.75 new FTE)

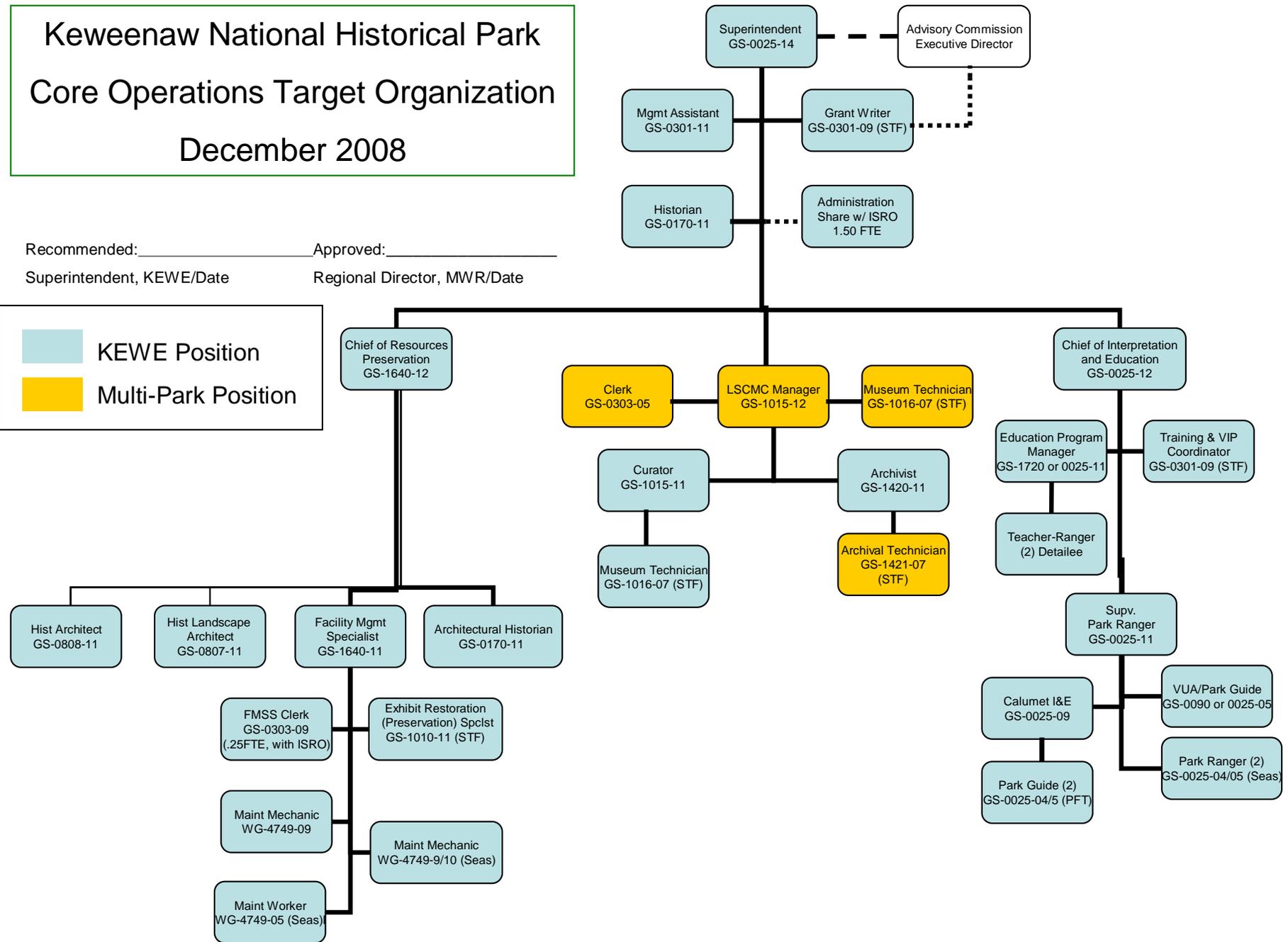
**Park Guides/Seasonal Rangers** – (two of these positions already exist as GS-5 seasonal Park Rangers) these positions would provide the front line of visitor services, operating NPS facilities within the Quincy and Calumet Units, providing park information to visitors, community members, and partner organizations. (0.75 existing FTE plus 2 new FTE)

**NOTE:** Neither these positions nor the target organization chart reflect any potential operational partnership at the Quincy Smelting Works (smelter) in the Quincy Unit. KEWE is committed to identifying a viable owner for the smelter, advocating for a use of the smelter that preserves its historic values as identified in the Quincy Mining Company National Historic Landmark registration, and, if necessary, participating in its operation as a historic attraction. The ability to open the smelter to the public is expected to be several years distant, but could occur as early as 2010 if congressionally-directed-spending becomes available to the current owner.

**Keweenaw National Historical Park  
Core Operations Target Organization  
December 2008**

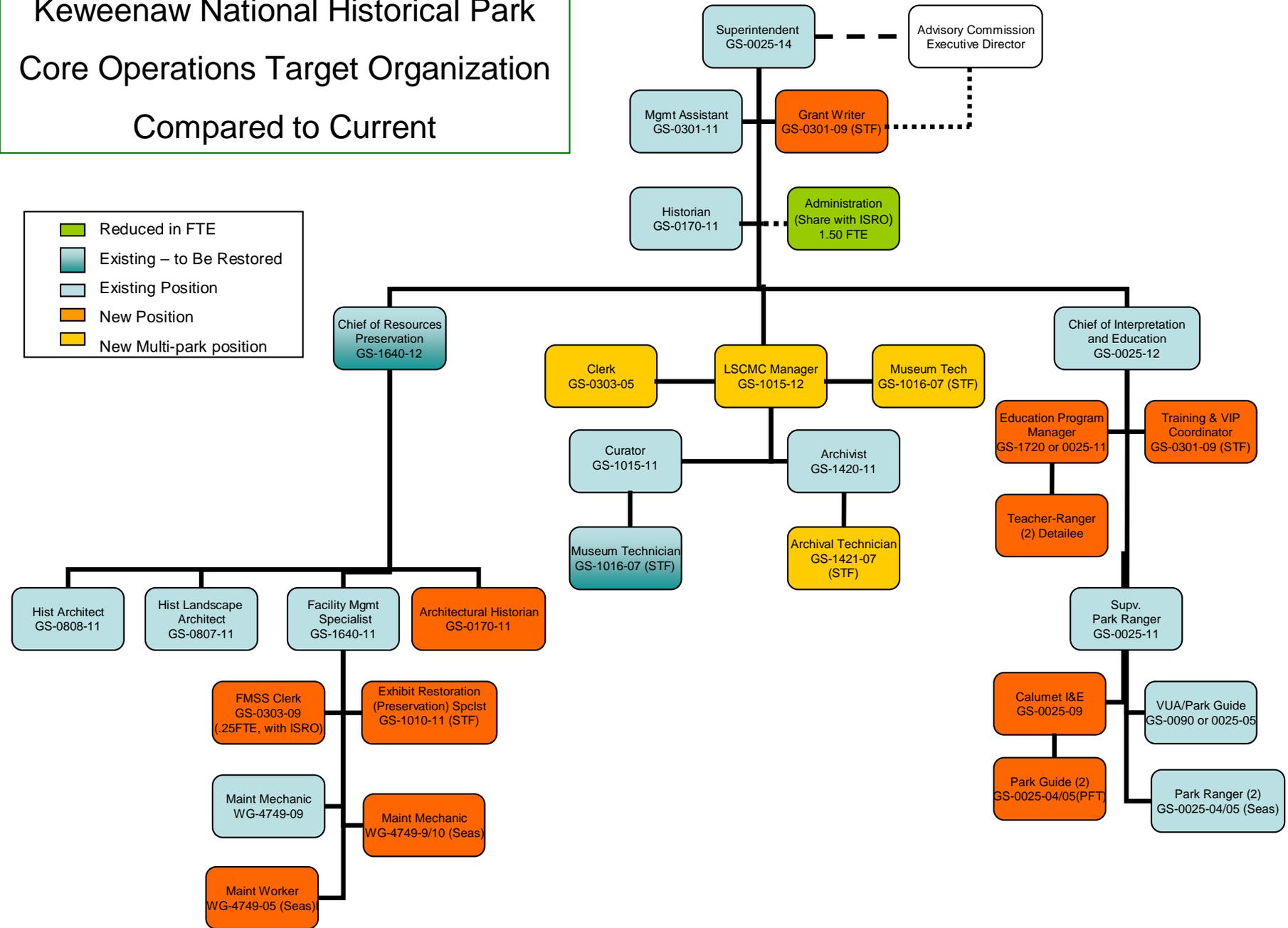
Recommended: \_\_\_\_\_ Approved: \_\_\_\_\_  
 Superintendent, KEWE/Date Regional Director, MWR/Date

KEWE Position  
 Multi-Park Position



# Keweenaw National Historical Park Core Operations Target Organization Compared to Current

- Reduced in FTE
- Existing – to Be Restored
- Existing Position
- New Position
- New Multi-park position



## Prioritized OFS Funding Request Packages

<b>#1 Restore Preservation Management, Operate Union Building, and Sustain Grant Program</b>		
<b>New or Restore</b>	<b>Position or Other Requirement</b>	<b>FTE</b>
Restore	Chief of Resources Preservation	1.00
New	FMSS Specialist	0.25
New	Grant Writer	1.00
New	Calumet Unit Ranger	1.00
New	Park Guides (Seasonal)	1.00
Restore	KEWE Grant Program Funding	0.00
Restore	Museum Technician	0.50
New	Utilities for Union Building	0.00

### ***KEWE Funding Package Number 1***

<b>New or Restore</b>	<b>Position or Other Requirement</b>	<b>FTE</b>
New	Education Specialist (Program Manager)	1.00
New	Exhibit Restoration (Preservation) Specialist	1.00
New	Architectural Historian	1.00
New	Training and Volunteer Coordinator	1.00
New	Maintenance Mechanic / Maintenance Worker (Seasonal)	1.00

### ***KEWE Funding Package Number 2***

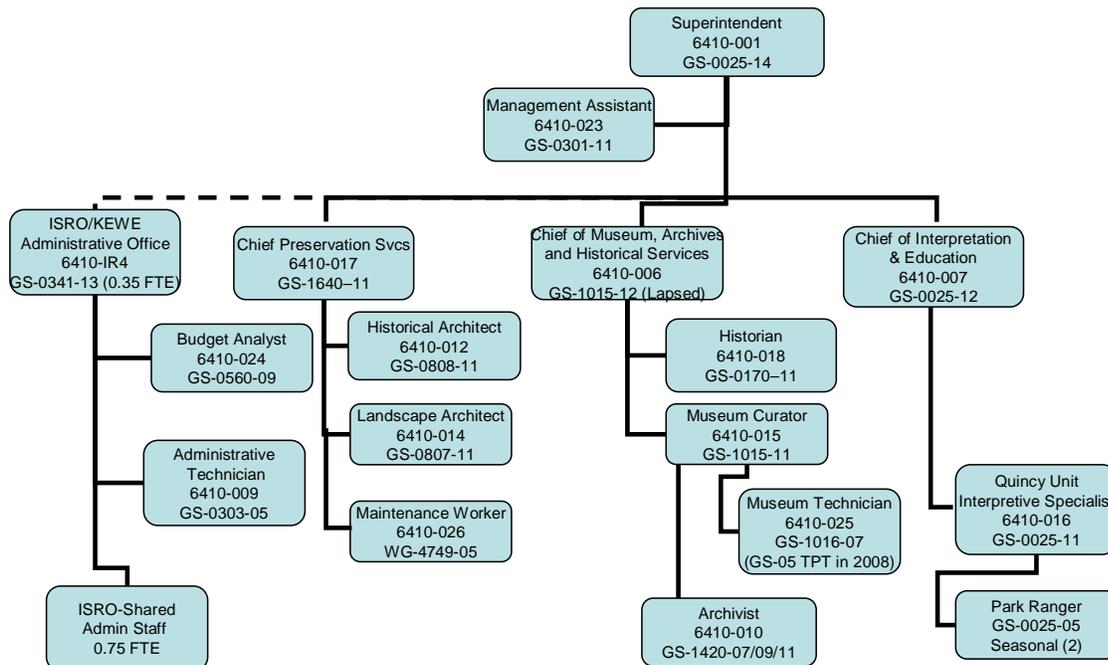
<b>New or Restore</b>	<b>Position or Other Requirement</b>	<b>FTE</b>
New	LCSMC Manager	1.0
New	LCSMC Clerk	1.0
New	Museum Technician	1.0
New	Utilities for LCSMC and Travel Support	0.0
New	Archival Technician	1.0

### ***Multi-park Funding Package***

## II. The Current Situation and a Sustainable Budget Plan

This section of this report is a result of the 2008 core operations analysis which used budget and cost projections for 2008 through 2012. It addresses the results of those projections, which demonstrate that the NPS at KEWE cannot sustain its present level of operations without significant increases in appropriations. Absent those increases, which are not projected, the analysis suggests alternatives for reducing expenditures, incorporating a mix of opportunistic staffing reductions and non-labor cost reductions. The 2007, or baseline, level of operations is presented in the “Current Organizational Chart,” below.

### KEWEENAW NATIONAL HISTORICAL PARK ORGANIZATIONAL CHART Current (May 2008)



## Financial Health

**Implementing Previous Reviews** – Since the 2000 Business Plan, described in “Organization and Previous Analysis” above, KEWE has received OFS increases of \$950,000 in support of NPS and partner programs. Since the 2004-2006 *Living Within Our Means* reviews, KEWE has received no additional operational funding. The most recent increase garnered by KEWE was in 2002<sup>11</sup>, and that \$100,000 increase was aimed at funding the preservation grant program. No further progress has been made in funding the approved 2006 organization; in fact one previously filled position has not been fully filled since 2006, and a division chief position has been left vacant for nearly all of 2008.

**Operations Increases** – A history of KEWE operating increases from 1994 to 2008 is represented in table 1. No substantive increase in operations funding has occurred since 2002, and KEWE’s requests for 2009 and 2010 were not forwarded to the NPS Washington Office as Midwest Regional Office priorities.

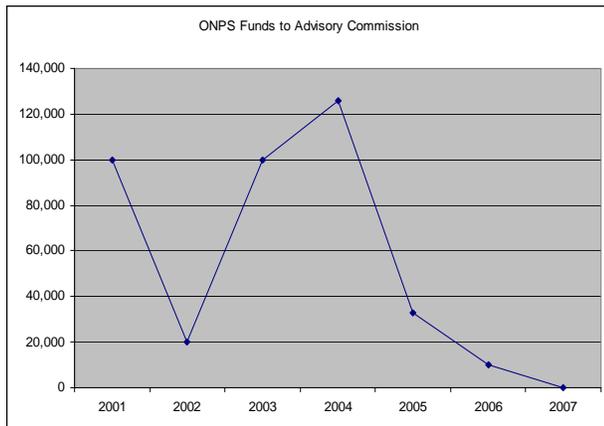
<sup>11</sup> A statutory aid increase of \$789,000 was received in 2005 for support of Main Street Calumet and was withdrawn in 2006.

Funded Year	Amount (\$000)	Title	Purpose
1994	150	Support Interpretation Programs at New Area	Superintendent, historical architect, interpreter, administrative technician
1997	46	Coordinate Partnership Interpretive Programs	Interpretation
1999	200	Establish Basic KEWE Programs	Three museum positions and advisory commission
2001	750	Establish Basic Programs at New Partnership Park	A museum position, management assistant, interpretation position, three maintenance/preservation positions
2001	100	Initiate Operational Support for Park's Advisory Commission	Advisory commission support
2002	100	Provide Preservation Program Support	Grants program

**Table 1:** Operating Increase History

As is typical at NPS units in recent years, the planned use of these increases has not been consistently sustained as funds have been diverted to make up for operating shortfalls or to fill needs arising out of changing conditions. One constant at KEWE has been the diversion of what may appear to be “discretionary” funds for financial assistance and advisory commission operations to other NPS purposes. This ability to divert funds from partner programs has allowed KEWE to mostly maintain its own operations and technical assistance programs, but at the high expense of both the functions of the Keweenaw NHP Advisory Commission and financial assistance to the NPS’s other numerous partners. Only by keeping the Chief of the Museum, Archives, and History Division vacant in 2008 was KEWE able to implement a small grant program in support of the Keweenaw Heritage Sites and other partners within the NPS boundaries.

The advisory commission has been forced by these NPS decisions to seek its own funding via statutory aid and was successful in obtaining funds in 2008, but this funding is highly insecure for the future, maintaining a high level of inconsistency and uncertainty in commission programs and partner support.



**Figure 4:** Advisory Commission Funding

Funds actually transferred from KEWE to the advisory commission each year are illustrated in figure 4.

In the past five years, as illustrated in figure 5, KEWE’s ONPS budget increased a total of only 4%, including pay cost, OFS, and other “across-the-board” increases. Mandated pay increases alone, however, have cost KEWE 15-20% during the same period. Grade increases related to upward mobility positions have significantly increased the resulting deficit, and one more such increase occurred in 2008. As described above, the deficit has manifested itself in the form of the withdrawal or near elimination of financial support to critical park partners including the KAC. In 2008,

KEWE was able to provide a very modest \$30,000 in grants to historic property owners only due to the lapse of a key management position and the earlier elimination of a full-time curatorial technician position.

**Other-than-ONPS Revenue** – Revenue from sources other than KEWE base and traditional project accounts has been miniscule and has had little impact on the viability of KEWE operations. (Significant funding has been received from alternative sources, e.g., grants and Parks-as-Classrooms funding, for education and interpretation projects.) While KEWE leases the Quincy Mine Office, the revenue has amounted to no more than \$7245 a year. While historic leasing is eventually an option for other park buildings, the problems identified with this issue (see Needs and Emerging Issues above) are difficult to overcome, considering the economic situation of park communities. The NPS does not yet have facilities or living history programs that support entrance, user, or interpretive fees.

Donation boxes, like a leasing program, compete with the revenue development objectives of park partners. Project funds do supplement the ONPS budget, but generally do not support routine KEWE operations or permanent staff.

**Historic Leasing** – KEWE’s historic leasing program includes just one historic structure, the Quincy Mine Office, leased to two organizations and also utilized for office space by the Isle Royale and Keweenaw Parks Association. Annual revenue of \$7000 from the historic leasing program is minimal, but supports utility usage in the leased structure. As other historic buildings are acquired by the NPS, the potential for revenue to be applied to historic preservation increases, but is subject to the considerations described above.

**Labor Costs vs. Non-Labor Costs** – Cost projections generated by the automated BCP program and used during KEWE’s February 2008 CORE Workshop projected KEWE personal services costs at an average 77% of annual ONPS funds. This ratio is typically considered healthy; however, the ratio has been achieved to such a degree only through the near elimination of partner support, a key and legislatively-mandated park function. This ratio should not be accepted as a true measure of flexibility at this partnership park: while KEWE has been able to adjust programs to stay within its appropriation, it is no longer fully and successfully carrying out the park purpose.

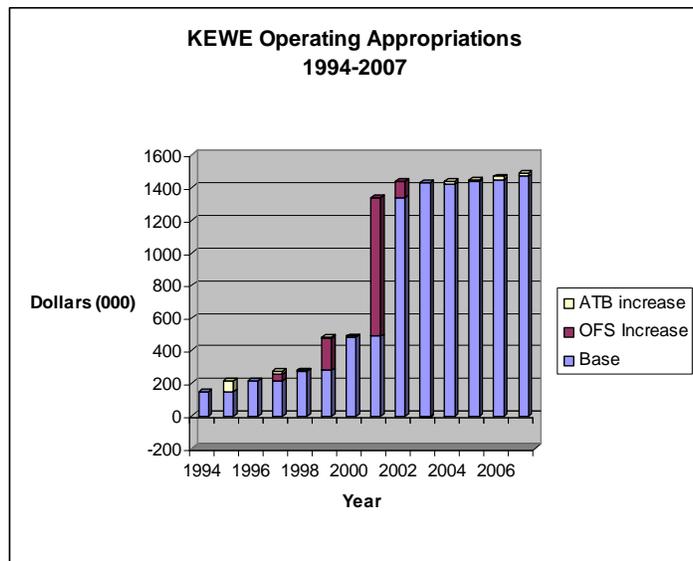


Figure 5: ONPS Funding History (since establishment)

## Prior Adjustments and Implemented Efficiencies

Until 2008, KEWE has had enough flexibility in its non-personnel expenditures that there have been few impacts on permanent NPS positions. This does not imply, however, that there have been few impacts in the NPS's ability to meet its mission. Since the last operating increase in 2002, KEWE has continuously eroded the assistance provided to partners, assistance that is inherent in park legislation. Funding to the Keweenaw NHP Advisory Commission has been intermittent at best and, in 2007, was budgeted at only \$10,000 (while two funded OFS requests for this purpose were in the amount of \$100,000 each). While grants to owners of historic properties to "mark, interpret or restore" have also been sporadic, the initial 2008 budget had no funds set aside for this purpose. Ultimately, KEWE made no award to the KAC in 2007 and granted \$30,000 to historic property owners in 2008, funds available only due to the one lapsed management position.

Some savings have been engineered in recent years via eliminating work/positions, improving efficiency, and avoiding costs (see table 2):

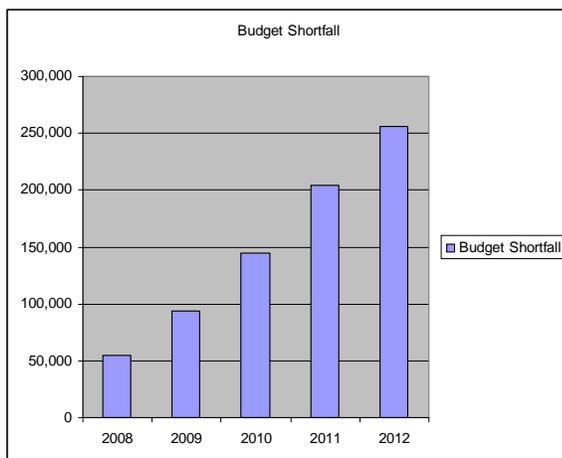
Action	Type	Implemented by (and notable consequences)	Gain
Combine administrative office function with ISRO	Efficiency	Elimination of KEWE's GS-09 Budget Analyst (AO) position, substituting instead 35% of ISRO's GS-13 AO position	\$23,000/yr
Reduce museum housekeeping expenses	Cost Avoidance	Lapsed GS-07 Museum Technician—work was redistributed to GS-11 and 12 professional staff	\$48,000/yr
Support partner operations	Cost Avoidance	Renew and formalize Cooperating Site program as Keweenaw Heritage Sites, allowing partners to present public face for the national park	>\$3.5 million /yr between NPS and Advisory Commission
Reduce costs for volunteer and MWR travel	Efficiency	Monthly rent of furnished apartment rather than pay lodging or seek short-term housing opportunities	Est. \$2000/yr
Reduce copier inventory by one	Cost Avoidance	Eliminated recurring costs of one of three copiers in HQ	\$3500
Reduce employee awards	Elimination	Annual budget for employee awards reduced.	\$2000/yr
Eliminate commission support	Elimination	Provide no financial support to advisory commission leading to loss of partnership potential in managing park functions	\$100,000/yr
Initiate cost recovery programs	Revenue Enhancement	In 2007 developed cost recovery program for archival and museum document duplication programs; in 2008 developed for-fee interpretive services with local tour operation vendor	Est. \$2000/yr to date
Initiate development partnership	Revenue Enhancement	Entered into agreement with the National Parks of Lake Superior Foundation for fundraising purposes	Initial grant of \$2000/yr

**Table 2:** Efficiencies implemented prior to February 2008 CORE Workshop (savings or new revenue)

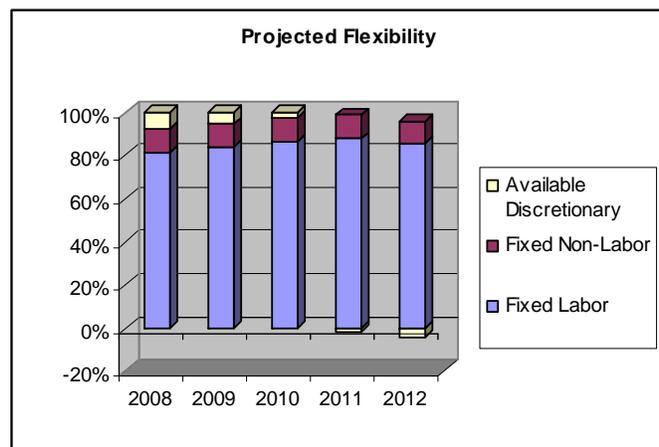
## Budget Cost Projection, February 2008

Prior to KEWE's core operations analysis workshop in February 2008, KEWE completed a budget cost projection (BCP) for the years 2008 through 2012, using fiscal year 2007 as a baseline. The BCP projected ONPS budget shortfalls for 2008 and the four subsequent fiscal years (see figure 6). Using the calculation generated by the BCP program, this shortfall, if not reduced by other means, would result in the elimination of .72 FTE by 2008, and a total of 2.76 FTE (i.e., nearly three full time positions) by 2012 – nearly 18% of ONPS FTE.

The projection also demonstrated (see figure 7) that KEWE possesses what appears to be a reasonable amount of flexibility in the first two out-years to adjust spending, short of drastically reducing FTE: projected fixed labor costs represented only 77-82% of the ONPS budget for these years, but escalated to over 90% by 2012. However, fixed non-labor costs represented another 11-12% each year. And, further, similar to the above discussion in "Financial Health," these calculations do not consider costs that should be fixed in KEWE's financial program – commitments to fund the functions of the advisory commission and a financial assistance program.



**Figure 6:** Projected ONPS Shortfall from February BCP



**Figure 7:** Projected ONPS Flexibility

Upon further review of the non-labor costs determined to be "fixed" when preparing for the workshop, it was discovered that many fixed costs were actually flexible costs, such as the nearly \$20,000 annual supplies expenses for the divisions and rent for the furnished apartment for visiting staff and volunteers. That said, however, adjusting these figures will not substantively alter the results of the projection with its \$250,000 deficit by 2012. However, the recommendations for future efficiencies identified below may include reductions in some costs initially identified as fixed.

In preparation for KEWE's Core Operations Analysis Workshop, the KEWE management team reviewed each type of work (function) carried out in each division, itemizing FTE by the amount necessary to accomplish this work. Each function was analyzed to determine if it is required by law, and whether it is core and essential, is core and important, enhanced other core functions, or is extraneous to principal park purposes. A facilitated review of this analysis was accomplished during the workshop, where it was concluded that all work being carried out was either directly tied to park purpose or supported functions that are core to park purpose. Further review of KEWE functions could only prioritize them. Prioritization required comparing functions to both KEWE priorities and its long-term goals, both itemized above. No single existing program was identified as beyond core through the workshop process.

Another product of the workshop was a list of potential efficiencies that the KEWE management team was to review and analyze. This was only a starter list. Since the workshop, the management team and others have reviewed and refined the data used in the workshop, discussed and analyzed potential efficiencies, and made recommendations for reducing FTE through adjusting existing positions and reducing non-personal services expenditures. Examining the detailed FTE itemizations developed for the February workshop, the 2008 core evaluation and sustained budget planning have resulted in a number of recommendations by KEWE staff for avoiding costs and for opportunistic reductions in core operation levels (position eliminations). If implemented, these actions will result in a sustainable level of operations through the year 2012.

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## **Strategies for Addressing Anticipated Shortfalls (Implementation Plan)**

Like any organization, there are places where KEWE can become more efficient. These include more efficient management of travel, supplies and materials acquisition, and better managed meetings. While some efficiency may be gained in certain functions, the work force at KEWE is so horizontally diverse that no one efficiency will capture even significant portions of entire positions or result in logically combinable positions. As Part I. analysis in this report indicates, KEWE is already operating at levels well below core requirements and well below its potential. Therefore, KEWE proposes a combination of short-term reductions in both non-labor and labor expenses (see table 3 below). The opportunistic human resources reductions will not improve efficiency but only reduce the accomplishment of necessary work. Thus, there is an urgency to restore funding for lapsed positions as quickly as possible.

### **Efficiencies and Reductions Suggested in February Workshop**

During the February CORE workshop, participants were divided into four inter-divisional groups and asked to suggest means of establishing a more efficient operation and organization, eliminating less essential core activities, avoiding costs, and enhancing revenue.

All four groups suggested the consolidation of divisions, particularly combining the Museum, Archives, and History Division with the Preservation Services or Interpretation and Education divisions, eliminating one division chief position. The further consolidation of administrative functions and positions was also identified as a likely candidate for gaining efficiencies by each of the groups. These were the largest ticket items common among the groups (totaling roughly \$150,000). Each of the groups varied as to how to further reduce budget requirements. But due to time constraints, most focused on the elimination of positions rather than full consideration of function, though inherent in the positions discussed was a ranking of KEWE functions. These suggestions are itemized below in table 3, along with a brief description of impacts to park operations.

Action	Type	Cost/consequences	Savings in 2008
Further consolidation of administrative functions	Efficiency	Loss of immediacy in addressing administrative needs.	\$60,000
Combine two divisions	Efficiency	Dilution of professional leadership (actual savings would be considerably less if a reduced-grade facility manager is still required)	\$15,000 to \$90,000
Reduce grade of one or more GS-11 positions to GS-9	Cost Avoidance	Reduces professional expertise available to resources, staff, and partners. Transfers some lower-graded work to higher-graded positions.	\$15,000
Terminate apartment lease	Cost Avoidance	Loss of efficiency captured in "Prior Adjustments and Implemented Efficiencies" above	\$4200
Purchase #2 Dry House rather than lease	Cost Avoidance	Transfer of costs to routine maintenance and special funding accounts, but overall a desired outcome	\$2500
Reduce professional and community memberships	Cost Avoidance	Loss of currency in professional expertise; some loss of partnering opportunities and community engagement locally	\$1800
Further reduce performance awards by 33%	Cost Avoidance	\$13,000 gross awards reduced by a third; reduces award budget to 1% of personal services, reducing recognition of outstanding work	\$4300
Mothball Quincy Mine Office	Cost Avoidance	Loss of partner space for park association; loss of \$7000 lease revenue annually; deterioration of interior spaces of high integrity	\$28,500
Further reduce travel from management positions	Cost Avoidance	Following behind existing reductions to an average one trip for each employee other than the park manager: loss of professional and other required training, loss of contracting supervision capability in the park.	\$3000
Reduce six vehicle fleet to 5	Cost Avoidance	Potential loss of connection with partners or inability to conduct YCC work outside Calumet Unit.... general inefficiencies	\$4300
Reduce seasonal staff by 50% (from 2 to 1)	Cost Avoidance	Reduce staffing at orientation facility to five days/week and lunch hours, eliminate walking tours or move lower- graded work to higher level employees	\$12,000
Convert staff (TBD) to STF	Cost Avoidance	Reduced workplans re: technical assistance or operations	\$18,000
Eliminate one GS-11 Position (various suggested)	Cost Avoidance	Reduces ability to provide technical assistance to both NPS and partner staff and moves lower-graded work to higher- graded employees, or in some cases removes ability to accomplish required specialized work (e.g., curator position)	\$80,000

**Table 3:** Suggested Cost Reductions from CORE Workshop

After analysis of these potential cost-saving measures and their consequences, KEWE proposes these short-term strategies for matching anticipated costs with anticipated funding.

## Non-Labor Reductions and Revenue Enhancement

**Supplies, Services, and Materials** – KEWE has not previously implemented across-the-board reductions in supplies and materials. It is recognized that these expenses can be temporarily reduced. Future itemization and prioritization will reduce these non-fixed expenses, a cost avoidance/elimination of \$5500 to \$11,000 per year.

**Travel** – Base-funded travel expenses can be modestly reduced due to expected reduced travel ceiling requirements that count project and planning travel against the ceiling, resulting in an elimination of up to \$5000 a year.

**Awards** – In FY 2008, the amount of funds set aside for awards was substantially reduced from previous years, totaling only 1.5% of personal services costs. A further reduction of ½% would yield \$4300 in savings.

**Lease Review** – Review current lease agreements for the Quincy Mine Office, complete appraisals, and renegotiate when contractual circumstances allow.

## Reorganization, Lapsed Positions, and Combined Positions

**Division Reorganization** – Solely on the basis of necessity, and contrary to the Business Plan and *Living Within Our Means* recommendations, the analysis of the management team suggests that a temporary reorganization of work could be accomplished when an opportunity is presented, by combining the Preservation Services Division with the Museums, Archives, and History Division, potentially allowing the continued lapse of one division chief position. KEWE proposes this temporary change to its organization while acknowledging that most savings will be derived from a substantial reduction in capacity resulting from the eliminated position. Some efficiency may occur as supervisory and division management duties are consolidated into one position, but inefficiencies will also occur as a broader scope of field supervision will be required. Further, it is evident that a working maintenance supervisor remains a requirement for seasonal and YCC operations. The restoration of a lead maintenance worker position would become KEWE's highest priority for position restoration during this interim organizational restructuring.

**Work Prioritization** – Core work has been reviewed to identify options for reducing FTE and related expense, with a particular eye toward feasible implementation. Positions with frequent turnover (Few if any), presently vacant, or with incumbents who are eligible to retire during the life of this plan (two) were considered as the most likely to provide opportunities for substantial change. Seasonal positions also provide opportunities for change. Eliminating seasonal positions, however, cannot be lightly considered – they provide the only field operations for KEWE, including staffing the contact facility, personal services interpretation, and routine maintenance. KEWE presently has no subject-to-furlough positions, though amending new positions to STF can provide significant flexibility and savings, but similarly cannot be lightly considered. Each new position refilled at the GS-11 level and below will be evaluated for its potential to change to STF status when refilled (and at least one conversion will be implemented). These are the proposed changes in park positions, based on opportunity, potential for consolidation and the potential for immediate impact to services and resources:

**Interpretive and History Consolidation** – KEWE employs one GS-11 Park Ranger in interpretation and education and a GS-11 Historian. The knowledge of the park's story required to be learned by the interpreter, while significantly less than that of the Historian, requires a slightly redundant workload of

research and education. The one interpreter provides seasonal front-line interpretive supervision, interpretive programming in the off-season, media development, project coordination and oversight, and substantial technical and material assistance (including training) to many of the Keweenaw Heritage Sites and other community partners. The Historian provides: an in-depth expertise of the park story; primary research and analysis required to establish basic understanding of key elements of the story not available from secondary sources; consultation and relations with mining families including taking oral histories; consultation and relations with researchers; project management for contracted research; and technical assistance in exhibit and media development with the Keweenaw Heritage Site partners. The Historian also coordinates cultural resources compliance work and paraprofessional archeology activities for NPS and partner projects. When one of these positions opens in 2009 or beyond, KEWE proposes to temporarily consolidate duties into one position yielding a projected elimination of \$85,000/year.

OR

**Archival and History Consolidation** – If the Archivist position should be vacated before the Park Ranger or Historian position, the work of the GS-11 Archivist and Historian will be consolidated. The Archivist manages KEWE's 1,200 linear feet of archival materials 30,000 photographic images within the museum collection; researches, cleans, arranges, describes, and catalogs collections to make them accessible to researchers; evaluates collections and performs basic paper conservation tasks; engages in donor relations; staffs KEWE's research facility and assists researchers; fills reference orders; and supervises interns and other volunteers.

OR

**Partner Coordination and Agreement Coordination Redistribution** – If the GS-11 Management Assistant position is vacated prior to either of the above, aspects of the work will be redistributed to other positions. The Park Manager would take on most coordination with all partners and the development of all agreements with partners; technical assistance to the Calumet Main Street program would be discontinued; other managers and supervisors would be assigned day-to-day coordination duties (e.g., meeting participation); public information duties would be transferred to the Chief of Interpretation and Education; overall environmental compliance and coordination responsibilities would be assigned to the Historian; land protection activities, permitting, rights of way, and encroachment issues would be assigned to the Park Manager; and KNHP Advisory Commission coordination would be delegated to the Commission.

OR

**Landscape Architecture Work Consolidation** – If the Landscape Architect position is vacated prior to others itemized above, this position would be temporarily lapsed. Where appropriate, historical architecture and cultural landscape project management would be transferred to other professional positions, e.g., Historical Architect or Historian. Other landscape management activities – development planning, technical assistance, sign and wayfinding planning – would be reassigned where possible. Work not assignable, including much professional-level technical assistance, would be deferred.

**Seasonal Position Elimination** – To meet projections in 2009, if an anticipated retirement occurs the division consolidation described above is implemented resulting in the filling of a higher graded division manager, both seasonal interpreter positions and the one part-time museum technician position will not be filled until another vacancy occurs. This will result in the loss of all orientation desk staffing, the elimination of scheduled interpretive programs, and reassignment of museum housekeeping to substantially higher-graded staff.

**Professional Services Reduction** – To meet projections in 2012, at least one vacated GS-11 position beyond the consolidation identified above, will be converted to GS-09 prior to refilling.

**Impacts of Consolidation Note** – The analysis of impacts resulting from position consolidation is difficult to predict, particularly as the consolidation could occur within one or more quite varied professional positions. Whatever scenario unfolds, some core responsibilities necessary to fulfill the KNHP mission will be unassigned. Learning curves for reassigned work will increase. Much work will be deferred, and following past patterns, much of this will be assistance to partners. There may also be a significant inability to appropriately manage partner projects that are funded through NPS fund sources and to provide services to the State Historic Preservation Office when federal projects have the potential to impact NHL resources.

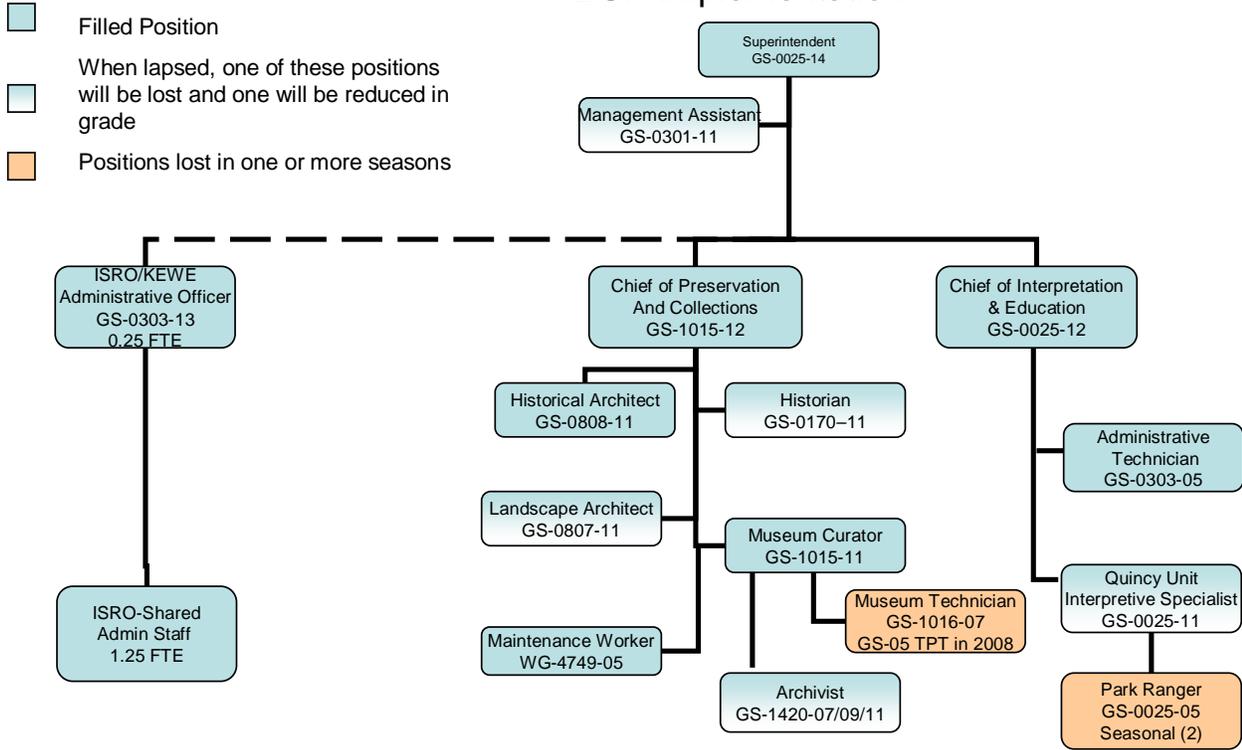
**Lapse Money** – KEWE, like most parks, is usually subject to some position changeover annually, but with its small number of positions and local recruiting success, fewer changeovers is experienced than in other parks. If and when these lapses occur, until permanent relief in the form of new operating funds becomes available, funds from lapses will go temporarily towards, in priority order:

- restoring seasonal services
  - providing field maintenance supervision of project management to support any lapsed position resulting from the MAHS/PSD reorganization
  - temporary positions that would restore lost functions from other consolidated positions.
-

# Budget Cost Projection-Driven Organization

The organization resulting from the implementation of these changes is illustrated here.

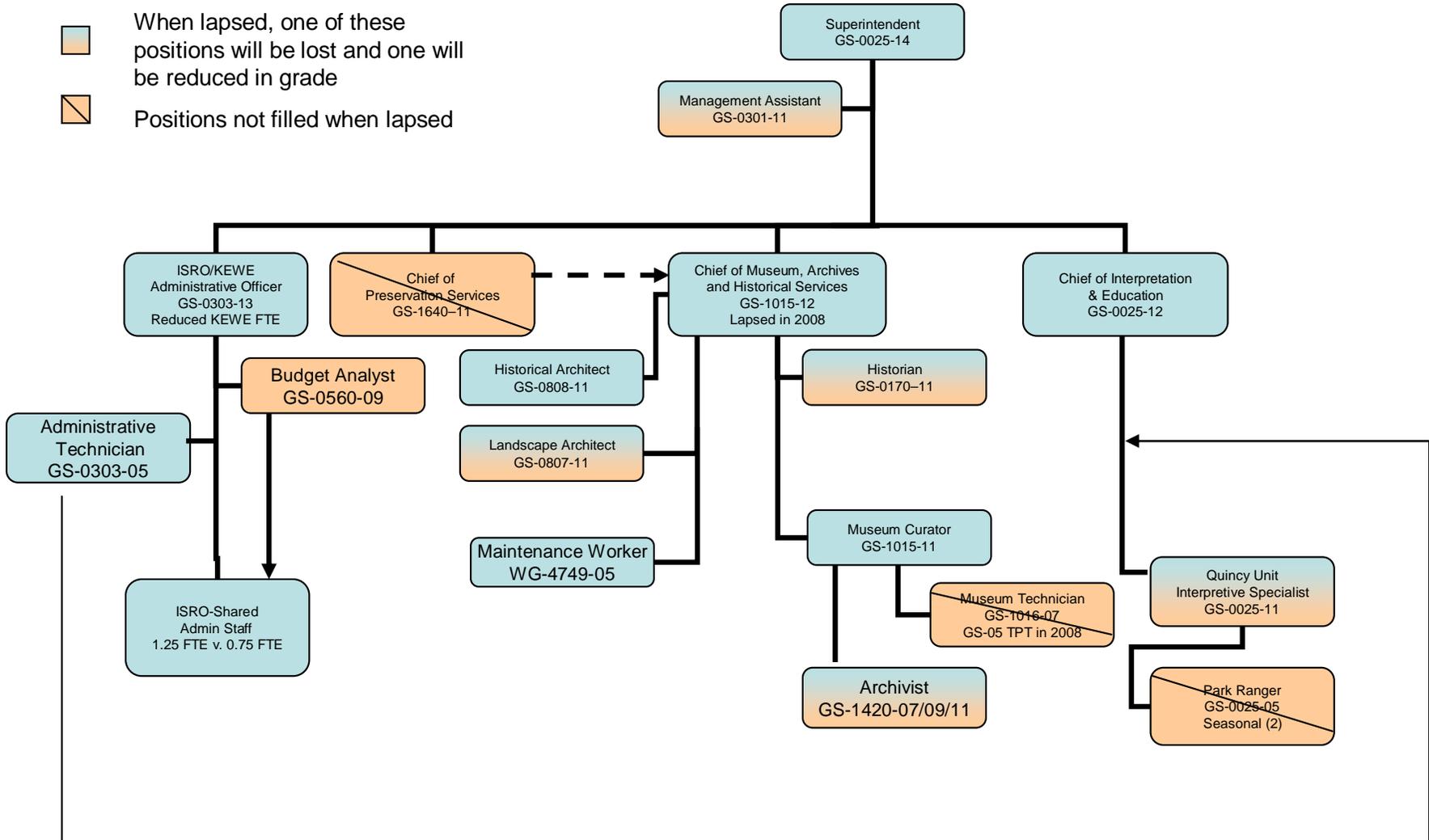
## KEWEENAW NATIONAL HISTORICAL PARK ORGANIZATIONAL CHART BCP Implementation



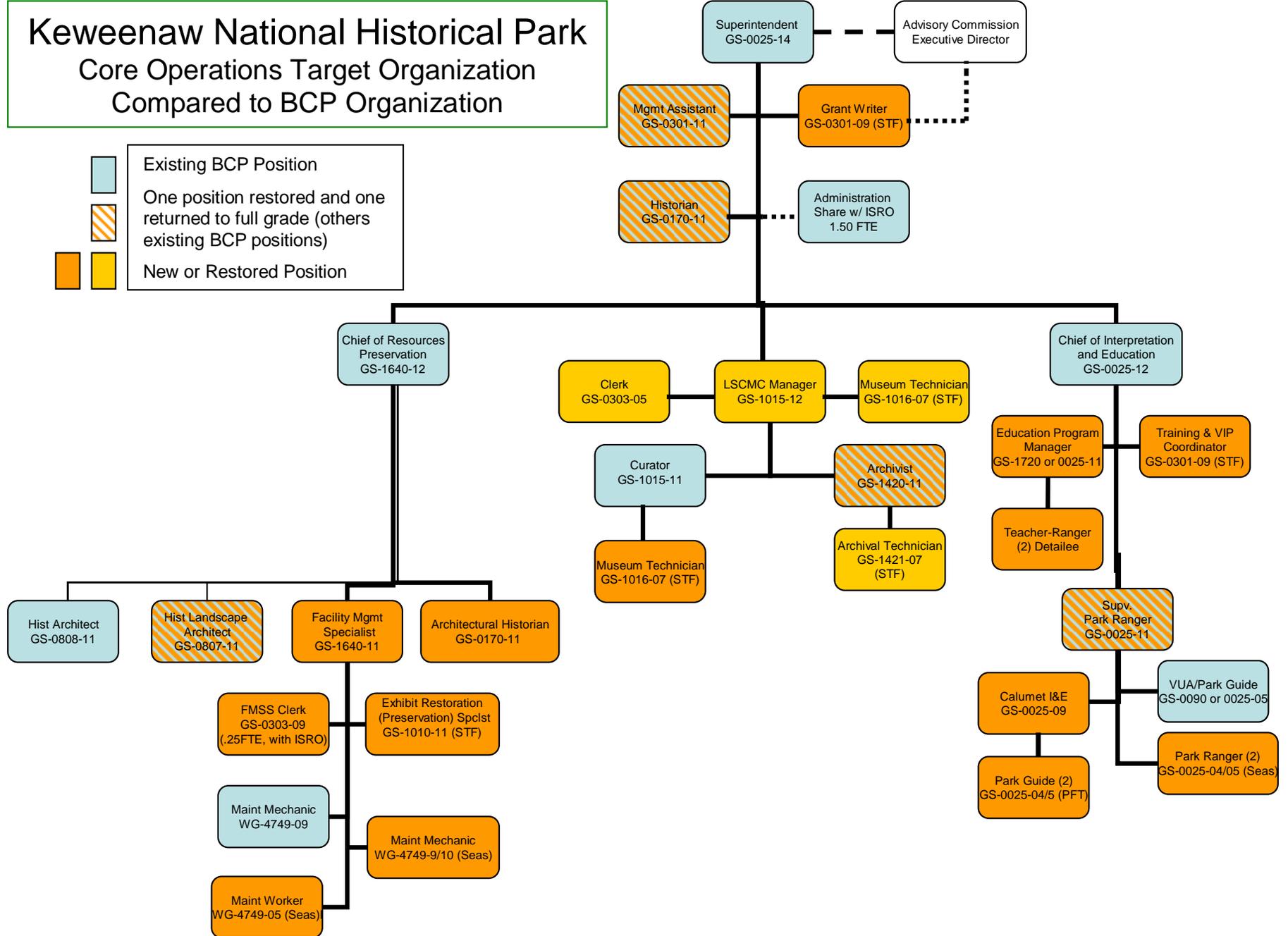
This BCP-driven organization differs from the current organization, as illustrated in the chart below.

# KEWEENAW NATIONAL HISTORICAL PARK ORGANIZATIONAL CHART BCP vs. 2007 Baseline (Current)

- Filled Position
- When lapsed, one of these positions will be lost and one will be reduced in grade
- Positions not filled when lapsed



And, the Core Operations Target Organization, illustrated in Part I., differs from the BCP-driven organization, as illustrated here.



## Impacts of BCP Implementation

Implementation of the sustained budget plan will have impacts on present visitor services operations in some years (when seasonal positions go unfilled), nearly eliminating orientation and interpretive services including the NPS operation at a partner site in the Quincy Unit. Those few direct visitor services that will be offered will be by the GS-11 Interpretive Specialist/Unit Supervisor, reducing the amount of technical assistance to partners and NPS exhibit and media planning undertaken and accomplished. Since the lapse of the permanent Museum Technician position, curatorial housekeeping has been accomplished by a part-time technician. This function will also require transfer of work to professional level GS-11 staff, reducing the amount of professional museum work that can be undertaken and accomplished. There will also be significant consequences regarding the EO program and partnership with our key university partner, with a reduced ability to hire diverse and partner candidates in training positions.

The reorganization of two divisions under one division chief will result in an expansion of the breadth of management and supervisory responsibilities while reducing significantly the amount of field work accomplishable by the chief in each of the two operations: preservation and museums. Project management work may supersede all other work requirements as KEWE is in line for funding for numerous preservation projects. Planning for the NPS's first major visitor facility and its museum/interpretive exhibits will also compete against routine management and supervision for the attention of the manager. YCC and seasonal preservation projects with partners may need to be eliminated due to lack of available supervision. Some curatorial managerial activities would be delegated to the curator, who would be less available to provide technical assistance and to address critical cataloguing goals. Oversight of an expected privately-funded project to inventory parkwide cultural resources would fall to lower-graded staff that would be less available to partners and the public. Planning for the Lake Superior Collection Management Facility would need to be postponed. Working with park partners to develop safety programs and approaches to accessibility would be postponed, delaying the potential to provide a more professional park experience to KNHP visitors.

The analysis of impacts resulting from position consolidation is difficult to undertake, particularly as the consolidation could occur within one or more quite varied professional positions. Whatever scenario unfolds, some substantial core responsibilities necessary to fulfill the KNHP mission will go unassigned. Learning curves for reassigned work will increase. Much work will be deferred, and following past patterns much of this will include assistance to park partners – a critical component of NPS work. There may also be a significant inability to appropriately manage partner projects that are funded through NPS fund sources. Further work prioritization will be required as specific opportunities for consolidation present themselves. But, an initial analysis suggests these impacts:

***Interpretation/History Consolidation*** – Consolidation would provide some very limited efficiencies by the establishment of only one position developing an exhaustive expertise related to the park story; however, this expertise would be founded primarily on secondary research with little new scholarship being developed on the many aspects of the park story of which very little is known or placed into regional, national, or topical context. Media development – for both NPS exhibits and assistance to partners – would be substantially curtailed if not eliminated, reducing the potential for providing basic interpretation for visitors across the park. When occurring simultaneously with the elimination of interpretive seasonal rangers, no new media development would occur unless contracted with little KEWE oversight. KEWE would need to utilize contract or MWAC archeologists for even the least complex monitoring activities and oral history research opportunities could be lost as those who participated in key area history are themselves lost. Participation in a critical privately-funded inventory of park resources would be at a less

professional level reducing the potential for analysis of significance and prioritization of treatment. Elimination of participation as a history professional in local historic district planning and evaluation could lead to the loss of accreditation of one or more districts.

**Archival and History Consolidation** – Consolidation of these positions could be much the same as above related to history, but the second set of impacts would be to professional services, particularly to the understanding and cataloguing of, and access via finding aids to, KEWE's very large archival collection. Reduction in time allotted to identification and preservation of archival collections in partner or private hands could lead to the loss of some of these invaluable resources.

**Partner and Agreement Coordination Reassignment** – If the Management Assistant position is vacated, some work will be redistributed to others at similar grades, e.g., coordination of NEPA compliance. Partner coordination activities would be redistributed to diverse staff members, but the bulk of responsibilities would be moved to the Park Manager. This would result in a significant reduction in public and partner outreach and postpone important planning, particularly among partners for a cohesive park experience. Less assistance would be provided to partners including the Keweenaw NHP Advisory Commission, and significantly less work would be directed toward development of alternative funding sources.

**Landscape Architecture Work Reassignment** – In the event the Landscape Architect position is vacated and lapsed, most functions associated with this position will be lost. The Historical Architect and Historian may be assigned oversight of some historical landscape research contracts and planning related to primarily structural components of the landscape, but the broad historical landscape architecture and preservation expertise would be compromised. Cohesive landscape planning among a complex mosaic of NPS and partner properties in both NPS units would be curtailed; opportunities for technical assistance related to landscape research, inventory and treatment and cohesive parkwide sign programs would not advance unless contracted with project funds. Landscape preservation assistance (primarily landscape research, inventory and treatment assistance) to partners would not be available, resulting in degradation of historic landscapes, including two national historic landmark districts, and new impairments to the park experience.

**Supplies, Services, and Materials Reductions** – These reductions would come in the form of elimination of professional memberships that provide professional opportunities for NPS and partner staff, elimination of KEWE's fitness program, reductions in NPS-funded volunteer budgets, and, primarily, in the supplies and materials devoted to media development for NPS and partner exhibits. The latter would reduce the potential for cohesiveness among park exhibits and cause the KEWE staff to be less sought out for professional expertise in the planning, design, and development of exhibits.

**Travel and Award Reductions** – While the impacts of these reductions may not be immediately evident, they would impact both the maintenance of professional expertise by KEWE staff and employee morale. Funds available for awards would be reduced to 1% of labor costs, resulting in performance awards even further below allowed maximums than at present. Some travel required to coordinate work activities with and seek assistance from state organizations and agencies would be avoided, reducing personal engagement in park matters by key organizations.

**Elimination of Diversity-Recruitment and Partner-Recruitment Positions** – Eliminating seasonal positions and the ability to supervise intern positions prevents KEWE from partnering with key local university programs and meeting its seasonal employment diversity goals.

The actions proposed to be taken to sustain KEWE's budget will have varying levels of impacts on KEWE priorities and goals (see table 4). The intensity of these impacts is indicated in this table: M=Modest, S=Significant, H=High/Highly Observable.

Description Of Action	KEWE Priorities								Long-Term Goals									
	1	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8	9	10
Division Reorganization		S				M		S			S			M			M	
Interpretive and History Consolidation	M	H	H	S	M	H	H	H			S	M	H	S	M	S	H	M
Archival and History Consolidation		H	H				H	H			S			M			H	
Partner Coordination and Agreement Coordination Redistribution	H		S		M	S	H		S	S	S	M		S			M	
Landscape Architecture Work Consolidation	S	H	H		S	S	S	H		S	S	S	S	H			M	
Seasonal Position Elimination	H			S	S	H	S		H			H	H	H		M		H
Supplies, Services, and Materials Reduction						M			M	M				M				
Travel Reduction		S							M	M	S							
Awards Reduction																		

**Table 4:** Impacts to KEWE priorities and goals

## Additional High Priority Needs

The reductions in costs identified above assume a starting point of 2007-level operations, which are substantially below the core operational requirements identified in the 2000 Business Plan, the 2006 *Living Within Our Means* exercises, and Part I above. These studies recognize the present and growing demand for KEWE services and community engagement and the anticipated growth in KEWE facility operations and programs. Beyond the restoration of lapsed positions and non-personal services budgets, some of the most pressing needs for additional funding include:

**Union Building Staffing and Utilities (by 2011)** – Visitor services staff and an increase in maintenance and utilities funding will be required to operate KEWE's first independent interpretive and orientation facility, expected to open late in 2011 or in 2012.

**Seasonal Interpreters** – KEWE has great opportunities to lead by example at the same time as the NPS assists partners in meeting the interpretive demands of visitors by assisting in the staffing of some of the NPS's partner facilities, particularly in the provision of personal services where few if any exist today. The benefits to accrue include a greater relationship with park partners, providing a more cohesive visitor experience, and broader recognition of NPS presence at this new national park.

**Financial Assistance Funds** – KEWE has been unable to sustain support for the KNHP Advisory Commission and its key park functions; further, financial assistance to partners has occurred only sporadically and the program fails to be seen as viable by park partners and historic property owners. Sustained funding for both the KAC and a transparent financial assistance program are necessary to fulfill these NPS obligations and meet critical park objectives.

## Conclusion

The above analysis in its two parts demonstrates a severe disparity between the organization and resources required to fully launch, preserve, and operate Keweenaw National Historical Park in compliance with NPS Organic Act, NPS Management Policies, and the public's expectations of a unit of the National Park Service, and 1) the present situation and 2) the potential implementation of a BCP-based organization.

## Next Steps

1. Include in OFS requests means to restore pre-2008 operation levels, financial assistance funds, and operating funds for the Keweenaw NHP Advisory Commission.
  2. Include in OFS requests means to meet requirements of expanded facility operation and meet industry standards for asset operations and maintenance.
  3. Include in OFS requests means to provide core NPS services to park visitors, assistance to partners such that a cohesive NPS-like experience is available to KNHP visitors, and adequate preservation of key KNHP resources, as described in Part I.
  4. Develop strategy to move KAC funding from KEWE base funds to a line item annual appropriation.
  5. Continue to identify and implement potential efficiencies in shared functions at KEWE and ISRO.
  6. Review leases at the Quincy Mine Office.
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## Appendices:

1. 2006 *Living Within Our Means* approved organization chart
2. KEWE Vision and Goals with potential actions
3. KNHP Advisory Commission Draft Strategic Plan

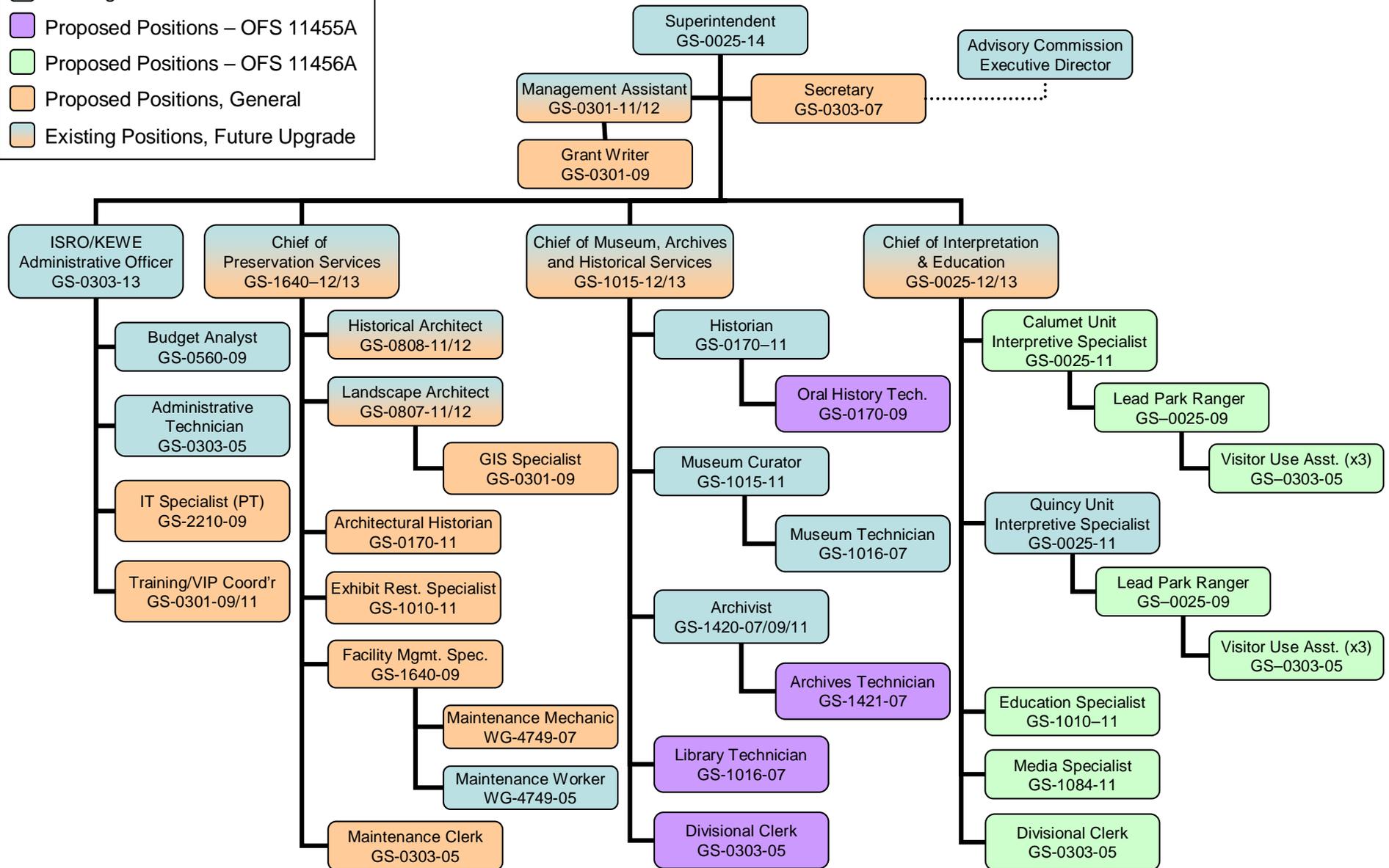
# Appendix 1

## KEWEENAW NATIONAL HISTORICAL PARK ORGANIZATIONAL CHART

Approved April, 2006

**Key:**

- Existing Positions
- Proposed Positions – OFS 11455A
- Proposed Positions – OFS 11456A
- Proposed Positions, General
- Existing Positions, Future Upgrade



## Appendix 2

# KEWE Vision and Goals (Adopted May 2008)

## VISION

The landscape and interpretive potential of the Keweenaw Peninsula “Copper Country” provide outstanding opportunities to observe and understand the multi-faceted and comprehensive historic record of hard-rock copper mining that began here 7000 years ago and continued to the 1990s. This mining took place often at an immense scale, and in 1992 Congress envisioned a commensurately large partnership between the National Park Service, the Keweenaw NHP Advisory Commission, and the numerous communities and public history organizations throughout the Copper Country to lead the preservation of this vast cultural landscape and develop its interpretive potential; the partnership was to be known as Keweenaw National Historical Park.

The National Park Service (NPS) aims, by the time of the NPS Centennial in 2016, to establish the 15-year old Keweenaw National Historical Park as a premier public history consortium, preserving significant historic landscape resources and interpreting the diverse stories of mining technology, corporate/human interaction, economic cycles, geology and environment, immigration and culture, and the role of copper in human endeavors.

The NPS will accomplish this through continued and expanded cooperative efforts, particularly through local governments and an expanding group of individually but cohesively operated Keweenaw Heritage Sites. The NPS will provide both financial and technical assistance to these organizations as they continue to provide and enhance many of the preservation activities and visitor services along the Peninsula. The NPS will anchor these activities with a traditional core of facilities in its two legislatively designated units, and will focus its programs on orientation and dynamically interpreting the overview and untold elements of the copper story. The NPS will also facilitate development of a comprehensive curriculum-based education program to reach every student on the Peninsula, and will increase diversity among visitors and employees through school and university partnerships. As both the post-copper-industry Keweenaw Peninsula and the State of Michigan are now economically challenged, a sustainable network of organizations supporting the park through fund-raising and other development activities will be developed to accomplish the vision.

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## LONG-TERM GOALS

### PARTNERSHIPS AND SUSTAINED OPERATIONS

**1. By 2017, an organization or network of organizations is well established in raising support for Keweenaw NHP (NPS, Advisory Commission, and partners) as demonstrated through annual grants and donations (cash, in-kind) equivalent to at least ¼ of the park’s appropriated budget and the doubling of the number of volunteers.**

This will be accomplished with the Advisory Commission (first by developing the means to have a fully operational Commission) and additional partners, including development of strong relations with the Isle Royale Natural History Association and the National Parks of Lake Superior Foundation, developing a sustainable development program including making friends of mining-related and other potential corporate sponsors, and facilitating the recruitment and training of volunteers.

**2. By 2017, through cooperative efforts, visitors to the Keweenaw Peninsula can easily recognize and interpret cultural landscapes related to copper mining through well preserved and interpreted cultural resources, to the point that 25% of all visitors to the Keweenaw can describe the significance of the park at the conclusion of their visit.**

This will be accomplished through NPS partnerships with the Heritage Sites, Advisory Commission, and local communities, including the expansion of preservation and interpretive technical assistance and grant programs from the NPS to sustain these programs at a professional level, fostering Heritage Site collaboration, and seeking new partnerships with universities, State and regional cultural organizations, theme-related organizations, and tourism/economic development organizations.

## **RESOURCE PRESERVATION**

**3. By 2017, a strategy for the long-term protection of nationally and regionally significant copper-mining resources on the Keweenaw Peninsula is developed and its implementation initiated, and the Quincy Smelter will be stabilized and interpreted to the public. By 2010, the strategy for NPS units is being implemented.**

This will be accomplished by fostering community-based historic preservation (e.g., through grants, multi-tiered park affiliations, consultation, archival research assistance, planning, mapping assistance) and reuse of historic structures, developing a land protection plan (with the Advisory Commission) to finalize boundaries, identify and prioritize resources critical to the story, acquiring or partnering in the preservation of threatened critical resources such as the Quincy Smelter, determining uses for park-owned facilities, implementing cultural landscape plans now in development, developing preservation partnerships with local universities, and supporting preservation efforts of NPS unit partners such as: the A.E. Seaman Mineral Museum; Quincy Mine Hoist Association; and Calumet Village, Township, and Heritage Sites.

## **VISITOR EXPERIENCE**

**4. By 2017, visitors can experience a cohesive national park experience along the length of the Keweenaw Peninsula, allowing for easy understanding and selection of routes, sites, programs, recreational opportunities, and activities related to the copper mining story, while recognizing that multiple partners and missions are involved in preservation and interpretation.**

This will be accomplished by fostering the coordinated, cohesive, and meaningful telling of the Peninsula's diverse copper mining stories while maintaining the individuality of mission and method in the partnership sites and programs, by incorporating landscape interpretation opportunities into the area's rich outdoor recreational network, and by developing visitor contact stations.

**5. By 2017, the General Management Plan goal of providing a traditional national park experience is met in the two NPS units of the park through development of a core resource and interpretive experience that anchors the national park and partner sites.**

This will be accomplished by establishing a strong NPS identity through enhanced programming, a strong sense of arrival, contact stations in each unit, sustained access to park facilities, and a graphics identity/wayfinding program, by developing a core NPS park experience to anchor the Heritage Sites and other partners in interpretation and preservation (e.g., at the industrial complex in Calumet, Quincy Hill, and on larger tracts of NPS-owned land), and installing exhibits in each NPS-owned historic building.

**6. By 2017, all NPS and Heritage Site facilities open to the public are accessible, maintain a professional public appearance, are compliant with life-safety code, and foster environmentally sustainable practices.**

The NPS will accomplish this goal through grants and technical assistance programs to promote meeting of/continued adherence to life-safety code and accessibility standards.

#### **EDUCATION & INTERPRETATION**

**7. By 2017, a program is in place that has every student on the Keweenaw Peninsula experiencing at least once in their K-12 schooling an on-site curriculum-based program at the park (including the Keweenaw Heritage Sites).**

This will be accomplished by developing a NPS/partner education program and technical assistance to partners, utilizing new technology, teacher workshops, and the coordination of the development of a place-based “text-book” as requested by regional teachers with curriculum-based classroom and on-site activities, materials, and the development of related programs.

**8. By 2017, visitors year-round may gain an understanding of the park themes through dynamic and diverse interpretive opportunities at NPS facilities, including an interpretive experience in every park-occupied building and on NPS-owned properties. Partner sites will be approaching a similar result in interpretive media and programming.**

Visitors will be able to accomplish this through the park’s interpretive programs enhanced with dynamic and diverse methods (e.g., cultural demonstrations, historic resources being the stage for visitor and community engagement), the application of a full-spectrum evaluation program, combined interpretive planning, and a small-grants program to enhance partner interpretation, universal access, and wayfinding.

#### **PUBLIC HISTORY**

**9. By 2017, Keweenaw NHP is nationally recognized and frequently sought out as a prominent and accessible source of copper mining history through museum collections, research and interpretation.**

This will be accomplished through scholarship and publications, public engagement (e.g., the web, forums), exhibits, utilization of national engagement programs such as the Smithsonian Affiliates program, e-catalogs, traveling exhibits, traditional library and archival services, and the coordination of catalogs and museum collection development among the NPS, Heritage Sites, and partnering institutions, and serving as a clearinghouse for acquisition of museum objects outside the NPS’s scope of collections.

#### **EMPLOYEE DIVERSITY**

**10. By 2017, NPS seasonal employees at Keweenaw NHP will reflect the diversity of the regional universities through development of sustained recruitment programs and training opportunities.**

The NPS will accomplish this goal by developing sustained relationships with individual departments at regional universities, and developing step ladder opportunities for engagement of interested students and employees.

## Appendix 3

# Keweenaw National Historical Park Advisory Commission Draft Strategic Plan (3/18/2008)

Below are the draft mission, vision, goals and objectives for the Keweenaw National Historical Park Advisory Commission.

### MISSION

The mission of the Keweenaw National Historical Park Advisory Commission is to work in partnership with the National Park Service and others within Keweenaw National Historical Park to preserve, protect, and interpret the natural and cultural resources relating to the Keweenaw Peninsula's copper-mining industry for the enjoyment and benefit of current and future generations.

### VISION

In the vastness of Michigan's western Upper Peninsula is found the Keweenaw Peninsula, referred to fondly by many of its inhabitants as the "Copper Country." The 100-mile-long Keweenaw Peninsula follows a northeast-southwest course along the south shoreline of Lake Superior. Geologically it contains the roots of some very ancient and massive mountains, the Copper Range, which forms the spine of the Copper Country and run its entire length.

The inspiring landscape and the interpretive potential of the Copper Country provide outstanding opportunities to observe and understand the multi-faceted archeological and historic record of copper mining, including prehistoric workings some 7,000 years ago and the modern era of copper mining which began in 1844 and continued into the 1990s. This mining activity took place often at an immense scale and in 1992 Congress envisioned a commensurately large partnership to commemorate it for future generations of Americans. This partnership known as Keweenaw National Historical Park, which includes the National Park Service, the KHNP Advisory Commission, local communities, public history organizations, businesses and interested citizens located across the Copper Country, will lead the preservation of this vast cultural landscape and develop its interpretive potential by:

- generating through education an awareness within the public and by stimulating their interest in and support for the preservation, protection, and enhancement of the heritage embodied in the historical, natural, and cultural resources associated with copper mining and its effects on the Copper Country in providing that copper to a developing American industrial society;
- preserving, interpreting, and promoting the historical, natural, cultural, educational, and recreational resources related to the scientific, engineering, industrial, and ethnic heritage of the copper-mining industry in the Copper Country for the benefit, education, and inspiration of present and future generations;
- engaging in a collaborative process with the National Park Service and other community stakeholders to enhance natural and cultural resource preservation, through its interpretation, management and public use in the Copper Country; and
- fostering a close working relationship with all levels of government, the private sector and local communities in the Copper Country to preserve the copper-mining heritage while strengthening future economic opportunities and the quality of life.

## GOALS AND OBJECTIVES

**Goal 1.** Fulfilling its advisory role, the Commission will assist the NPS in preserving the cultural landscape and interpreting the stories of the Copper Country's rich heritage by *advising* the NPS through participation in the NPS planning process and by *assisting* the NPS in park operations technically, financially, and politically, and through property acquisition, where appropriate.

### Objectives:

- Advise the NPS by contributing to the development and implementation of plans such as the General Management Plan, Scope of Collections Statement, Comprehensive Interpretive Plan, Resource Stewardship Plan, and Core Operations Plan.
- Advise the NPS by contributing to NPS planning efforts concerning visitor facilities, preservation programs, budget, oral history program, signage, facilities, and other broad or specific General Management Plan implementation programs.
- Maintain dialogue with the NPS Superintendent to keep abreast of mutual issues, activities, and problems and participate in NPS management team meetings and discussion groups, as appropriate to maintain this dialogue.
- Assist the NPS by providing political, technical, and financial assistance to the NPS and Park, and by working collaboratively to develop policies and programs related to the preservation of Park values.
- Assist the NPS and Park by partnering in the acquisition of property for the Park, as appropriate, and by transferring Commission acquisitions to appropriate agencies for continued preservation.

**Goal 2.** The Commission will become a sustainable operating organization to carry out historical, educational, and cultural programs which enhance appreciation of the copper-related cultural resources in the Copper Country.

### Objectives:

- Develop a reliable source of funding.
- Develop operating procedures for the Commission.
- Hire appropriate staff to administer the Commission and pursue other sources of funding.
- Establish an endowment with large lead donations to provide ongoing support for operations and financial assistance grants with less dependence on federal appropriations.
- Maintain a 501(c)3 organization to facilitate fundraising capability.
- Explore, pursue, and take advantage of opportunities for funding, including foundations, grants, individual donors, the NPS Centennial Challenge fund, and the National Parks of Lake Superior Foundation.

**Goal 3. The Commission in partnership with the NPS and the Park's Heritage Sites will foster the Keweenaw Heritage Sites Program so that it may become a consortium of fully sustainable sites that help the Park fulfill its mission of preserving the heritage and interpreting the story of the Keweenaw's copper-mining history.**

**Objectives:**

- Enhance communication with and among Heritage Sites, including the use of commissioners as liaisons to specific sites.
- Enhance capabilities and expertise of Heritage Sites through technical assistance and educational opportunities.
- Provide financial assistance to Heritage Sites towards preservation, interpretation, and visitor access.
- Facilitate meetings with and among Heritage Sites.
- Help manage the Heritage Sites program (and any related designation programs) as a partnership among the NPS, the Commission, and the Sites.
- Act as intermediary between the NPS and Heritage Sites outside of park boundaries for the purpose of furnishing financial and technical assistance.
- Lead collaborative planning, with the NPS, for interpretation and public programming.

**Goal 4. The Commission in collaboration with the Park, the Heritage Sites, and other entities will provide visitors a cohesive, accessible, engaging, and safe national park experience along the entire length of the Copper Country.**

**Objectives:**

- Enhance communication with and among additional partners (such as: Main Street Calumet, Copper Country Trails Scenic By-way Advisory Committee, National Summit of Mining Communities, local universities, state of Michigan, local governments, as well as owners of other properties of significance to Keweenaw's copper story).
- Enhance capabilities and expertise of additional partners through technical assistance.
- Provide financial assistance to additional partners towards preservation, interpretation, and visitor access. Act as intermediary between the NPS and Sites outside of park boundaries for the purpose of furnishing financial and technical assistance.
- Help develop and implement preservation, interpretive, and visitor orientation strategies.
- Act as temporary steward of archival or object collections, as necessary, until partner organizations are capable of appropriate management and storage.
- Lead collaborative planning, with the NPS, for interpretation and public programming.

**Goal 5. The Commission will incorporate a historic preservation ethic and emphasize heritage awareness within its planning and implementation strategies, fostering the long-term protection of nationally and locally significant copper-mining resources across the Copper Country.**

**Objectives:**

- Create a "threatened buildings" program.
- Encourage compatible building design for new construction.
- Establish a fund for the acquisition of critical land parcels.
- Sponsor workshops promoting historic preservation techniques and the value of historic preservation and related ordinances in the economy and preservation of community character.
- Inventory resources related to copper mining, including mines, mills, smelters, transportation routes and facilities, and communities.
- Perform condition assessments of these resources related to copper mining and identify those of special significance for preservation and interpretation.
- Collaborate with all park partners on the development of a regional historic preservation plan.
- Develop a preservation and/or interpretation grant program.
- Assist homeowners in utilizing the state tax credit program for certified historic rehabilitations.
- Advocate for preservation of cultural landscape features and historic structures in the face of new development.
- Encourage and assist scholarship, publications, public presentations, exhibits, and other means of furthering the public understanding of the copper-mining history of the Keweenaw.
- Collaborate with park partners and schools to involve schoolchildren in understanding and preserving their heritage. Encourage and assist heritage celebrations such as festivals, ethnic gatherings, concerts, and other community activities that further an appreciation for the heritage of the Copper Country.