

Draft Version 1.2, June 1, 2023
Section 2, Methodology and Stakeholder Participation Process
Blueprint for the Keweenaw Heartlands

This draft will be incorporated into the final Blueprint. This and other sections completed before publication of the final Blueprint will be subject to at least one additional round of editing to ensure consistency, clarity, accuracy and flow in the final document.

In March 2022, The Nature Conservancy (TNC) engaged RES Associates LLC to conduct a highly participatory planning process to develop this Blueprint. RES (Rural Economic Success) is a small consulting firm specializing in working with rural communities to map out strategies and plans to maintain and build their economies, sustain their culture and lifestyle, protect their critical assets and lift up their citizens living on the economic margins.¹ This section summarizes the challenge associated with designing and implementing that process, the process ultimately used, as well as the steps taken to solicit public input that was truly representative of the variety of stakeholder interests.

Few documented models exist to help communities facing the dual challenges of mapping their economic futures and conserving critical environmental resources that undergird their economies, culture and way of life. Therefore, an additional component of the contract with RES is to thoroughly document the process used to serve as a roadmap for conducting a similar blueprint planning processes. That documentation is presented in a separate report, available through The Nature Conservancy.

RES was charged with designing a process that would lead to stakeholder trust in this Blueprint, and in the structure established to manage and govern the Keweenaw Heartlands for generations to come. Unlike a traditional community or economic development planning process with a time horizon of 3 to 5 or in rare cases 10 years, the goal is to create a Blueprint that will retain its currency and relevance for (literally) centuries to come.

That centuries-long time horizon is a necessary condition arising from TNC's involvement in facilitating the purchase, fronting the required cash and holding and managing the land until State and other resources can be obtained to reimburse the purchase costs.² As a global conservancy whose mission is "...to conserve the lands and waters on which all life depends," and a leader in combatting climate change by protecting critical ecosystems that help sequester carbon, TNC's work focuses on such an extended timeframe.

This extreme timeframe created unique challenges for a planning process. While there are dozens of visions of how the world may look one hundred or more years from now, no one can say for sure what economic, social and political structures will be in place. Nor can we predict what prevalent, society-defining technologies, new commercial uses of natural resources or what outdoor recreational practices will predominate at that time. Electrical transmission, the telephone and the automobile were all invented in the 1880's, less than 150 years ago. In addition, with an expected rapidly changing climate,

¹ See Appendix X for information about RES Associates, LLC, and its principal John Molinaro, who led this process.

² TNC is also using its deep experience in grant writing and fundraising to secure resources to reduce the state and local outlay necessary to acquire, conserve and manage these lands.

long term natural resource management decision making processes need to be both informed and adaptable.

Fundamental principles and related values tend to change much more slowly than technologies or social practices. They provide a basis for creating a Blueprint that can endure for generations. Therefore, this Blueprint and all the implementation work to follow is built on a set of enduring principles and values derived from this highly participatory and inclusive planning process.

TNC and Michigan Department of Natural Resources (MDNR) were committed to the creation of a Blueprint that reflects the authentic, combined voice of Keweenaw Heartlands' stakeholders through a process that did not inherently favor any one stakeholder's viewpoint or interests over others. In consultation with RES, they agreed to appoint a small cohort composed of senior TNC and MDNR staff to manage RES's involvement in the Blueprint planning project and to help ensure that the project remained on track. They informally described this small group as the project Oversight Team.

In addition to the Oversight Team, RES advised TNC and MDNR that public trust in the process would require formation of a Planning Committee, composed of a cross-section of local leaders of various stakeholder groups and constituencies. That Planning Committee was vested with primary responsibility for determining the contents and recommendations of the Blueprint, with the caveat that those recommendations would need to be consistent with the conservancy mission of TNC, as well as various regulations governing its nonprofit status, given its role in the purchase of the lands.

RES designed a Blueprint planning process that contained 8 major steps:

1. Initial stakeholder identification and interview process
2. Public and stakeholder group meetings
3. Planning committee recruitment
4. Stakeholder public survey process
5. Data summation and planning committee review
6. Iterative drafting and review of Blueprint sections
7. Public review and comment
8. Blueprint publication

Each step in the process is described in more detail in following subsections.

1. Initial Stakeholder Identification and Interview Process

At the outset of this process, both TNC and MDNR had extensive experience and deep relationships on the ground in the Keweenaw Heartlands. However, both recognized that their relationships did not include all the stakeholders with interests in the future of the Heartlands.

RES advised TNC and MDNR that a stakeholder identification and interview process would be a critical first step for the project. Identification of additional stakeholder groups and perspectives would be an essential element of this process. In addition, the process would be used to inform other forms of

stakeholder input, such as an online stakeholder survey. Interviews would help RES understand the range of concerns, issues, interests and viewpoints necessary to craft a meaningful survey instrument and determine how and to whom it should be disseminated.

Consulting with RES, the Oversight Team developed an initial list of about fifteen stakeholder groups whose input they knew would be critical to the process. In most cases, the Team also identified one or more key representatives of those groups to invite to interview. RES developed an interview protocol to ensure that a consistent set of topics would be explored allowing aggregation and comparison of the themes emerging from the interviews. RES also designed the protocol to gather information critical to public survey design.

RES began conducting interviews in March 2022. Every interviewee was asked to name other key stakeholders that they recommended that RES interview. Every recommended stakeholder mentioned by two or more interviewees was offered the opportunity to interview. Additionally, RES sought interviews from stakeholders who were recommended only once and represented a unique perspective from other interviewees.

In all, fifty-eight key stakeholders were interviewed, primarily between March 15 and May 31, 2022.³

TABLE 2.1 – Formal Associations and Personal Uses of Keweenaw Heartlands among Interviewees			
FORMAL ASSOCIATIONS*		PERSONAL USES OF KEWEENAW HEARTLANDS	
Keweenaw Resident or Landowner	48	Hiking or Backpacking	28
Natural Resources or Conservation Organization	12	Hunting	20
Local Elected Official	10	Mountain Biking	20
Tourism or Economic Development Organization	10	Winter Sports**	20
Local Business	10	Fishing	18
Logging or Wood Products Industry	6	ATV Riding	14
Higher Education Institution	6	Watersports***	9
Local Government (employee)	5	Sightseeing and/or Photography	8
State Agency (employee)	5	Foraging and/or Provisioning	8
Historic or Cultural Preservation	4	Snowmobiling	7
Keweenaw National Historical Park	3	Historical, Cultural and/or Geological Appreciation	7
Keweenaw Bay Indian Community	3	Camping	5
Keweenaw Nordic Ski Club	3	Trail Running	4
Public Safety Organization	2	Forestry/Logging/Sawmill	3
Keweenaw ATV Club	2	Trapping	2
Calumet Keweenaw Sportsmen’s Club	2	Birding	2
Copper Valley Trails Club (mt. biking)	2	Geocaching/Orienteering	2
Keweenaw Snowmobile Club	1	Golfing	1
Other Nonprofit Organization	2	Rock Climbing	1

* See definition of Formal Association in footnote 4, below.
 **Skiing snowshoeing, snowboarding and/or dogsledding
 *** Surfing, kiteboarding, kayaking, swimming, boating and/or SCUBA diving
 N=58, Interviewees could report multiple Formal Associations and Personal Uses

³ In eight cases, potential interviewees asked that one or two additional people sharing their primary stakeholder affiliation could join in their interview. During these interviews, each participant was asked to answer every Interview protocol question. Since each independently answered the questions, these additional interview participants are included in the total count of fifty-eight interviewees. One interviewee was not available during the primary interview period and was interviewed later.

Table 2.1, **above**, summarizes the primary formal associations of the interviewed stakeholders.⁴ In addition, all stakeholders were asked how they personally used the Keweenaw forests and/or their trails, and their responses are summarized as well.

2. Public and Stakeholder Group Meetings

Since transparency is essential to public trust, from the outset the Blueprint planning process included provisions for public and group meetings. Overall, RES conducted 8 stakeholder group meetings, and facilitated **5** public meetings with TNC and MDNR participation. Detailed descriptions of the public and group meetings and the processes used are discussed in subsections a. and b. below.

In addition to the extensive stakeholder input process used to create this Blueprint, the Blueprint itself recommends robust ongoing public involvement in ongoing implementation activities. See Section **6** for recommendations about ongoing stakeholder involvement.

a. Public Meetings

Public meetings were planned at the beginning, mid-point and near the conclusion of the planning process. Group meetings were offered to large stakeholder organizations whose primary activities were dependent on access to the Keweenaw Heartlands, as well as to any group that contacted RES, TNC or MDNR and requested a meeting. Overall, more than **five hundred** people attended these meetings.⁵

Early interviews were used to determine locations for the initial public meetings. Interviewees suggested that three meetings be conducted, one in Calumet, one in central Keweenaw County, and one in Copper Harbor, and suggested various venues that might be suitable. Interviewee expectations were that these meeting locations would both facilitate public access and encourage attendance by participants with differing perspectives and interests.⁶

Initial public meetings were scheduled at 6:30 p.m. on June 7, 8, and 9, 2022, in Calumet, Mohawk and Copper Harbor. The meetings were conducted at the CLK Commons in the Calumet High School, the Horizons Alternative High School Gym in Mohawk, and the Grant Township Hall in Copper Harbor, with approximately 60, 50 and 70 people attending.⁷

⁴ Except in the case of residence or land ownership, formal association includes ownership, employment, elected office, service as an officer, board member or fiduciary, or a similar connection. Most interviewees reported multiple formal associations. It does not include membership in stakeholder organizations for which the interviewee did not have an official or formal role.

⁵ Some attendees attended multiple meetings so are counted each time they attended.

⁶ For instance, stakeholders at the Grant Township meeting, who lived closest to the Heartlands, were most likely to interact with visitors as they utilized the Heartlands. Stakeholders at the Calumet meeting were more likely to interact with visitors as they shopped, dined or lodged in the southern portions of the Peninsula on their way to and from the Heartlands.

⁷ In every public meeting, as well as the South Shore Association meeting, some attendees bypassed the registration table, so the reported counts are approximate and understated.

Each public meeting ran approximately two hours. Meeting agendas began with 30 minutes devoted to overviews by TNC, MDNR and RES focusing on the purpose of the acquisition, preservation and Blueprint planning processes and progress to date. Meetings were then opened to public comment and questions. Meetings were adjourned when all questions had been discussed or at 8:30 p.m., whichever occurred first. TNC, MDNR and RES staff remained available to address individual comments and concerns afterwards.

The discussions in the initial public meetings were robust and the public response to the proposed acquisition, preservation and planning process was overwhelmingly positive. Themes emerging from the meetings were recorded both on a flipchart and in notes taken by staff of the Keweenaw Area Community Foundation (KCF), which had subcontracted with RES for onsite logistical and administrative support of the Blueprint planning project. Video recordings were made at the Calumet and Copper Harbor meetings.⁸

An additional public meeting was held at 6:00 p.m. on Wednesday January 25, 2023, at Keweenaw Mountain Lodge in Copper Harbor. Public interest ran extremely high due to news media reports that TNC had completed the purchase and assumed ownership of the land. More than one hundred people attended. The meeting agenda included an update on the acquisition and the Blueprint planning process and a question-and-answer session to seek public feedback.

TNC provided an overview and update, and RES facilitated the question-and-answer period. Overall, the meeting ran nearly two hours. Most public questions and concerns related to practical impacts of the change in ownership in the permitted public uses of the land. The underlying concerns expressed had all been raised earlier in the stakeholder input process and were under consideration in the Blueprint planning process.

On June 22, 2023, near the completion of the Blueprint planning process, TNC, MDNR and RES conducted an additional public meeting, in Eagle Harbor at the Vue meeting facility of the Harbor Haus Restaurant. Approximately XX people attended. Once again, the meeting focused on updating the public on project progress, including summarizing the principles for management and governance outlined in Sections 3 and 4 of this Blueprint. As with previous public meetings, the agenda primarily focused on answering questions and discussing public concerns.

[CHARACTERIZE THE JUNE DISCUSSION HERE]

b. Stakeholder Group Meetings

One of the stakeholder group meetings closely resembled the public meetings, with identical presentations and the same basic agenda. Interviewees suggested that the South Shore Association would provide an excellent venue to gain input from residents living along the southern shoreline and in the Lac LaBelle area. These residents live in an area that experiences heavy visitor traffic that at times has negative effects on local quality of life. RES was advised that South Shore residents were hesitant to

⁸ Technical problems prevented video recording at Mohawk and truncated the recording at Copper Harbor during the question-and-answer period.

attend public meetings and that an Association meeting would be an effective way to gain their perspective.

A meeting with the South Shore Association was held from 3:00 to 5:00 p.m. on June 9, 2022, at the Lac LaBelle fire station. Approximately forty residents were in attendance and the meeting was, reportedly, the best attended of any meeting ever held by the Association. As with the public meetings, the discussion was robust and reflected positive attitudes about the acquisition, preservation and Blueprint planning project.

In addition to the South Shore Association meeting, RES conducted or attended seven board or member meetings of specific stakeholder and user groups. Group meetings were offered to leaders of every major user group interviewed.⁹ In addition, membership or board meetings were organized with any group that made a direct request to RES. Overall attendance of these meetings included more than 150 people. Group and board meetings attended included:

- Keweenaw Area Community Foundation – Board Meeting¹⁰
- Keweenaw Chamber of Commerce - Board Meeting¹¹
- Houghton Keweenaw Conservation District – Annual Meeting
- Calumet Keweenaw Sportsmen’s Club – Membership Meeting
- Deer Camp Group¹² - Board Meeting
- Keweenaw ATV Club – Membership Meeting
- Keweenaw ATV Club – Board Meeting

The structure, content and duration of these stakeholder meetings was customized to the group’s interests and to fit into the agenda when combined with a regular meeting of the group. In each case the agenda included an overview of the Blueprint planning project by RES followed by a discussion period with attendees, focused on their questions and concerns.

3. Planning Committee Recruitment

From the outset, RES’s design for the Blueprint planning process called for creation of a diverse and representative Planning Committee, to serve as the principal body responsible for the contents and recommendations of the Blueprint. Following and informed by the completion of most interviews, RES recommended, and TNC and MDNR approved, an initial list of constituencies to be invited to participate on the planning committee. Membership invitations were issued to sixteen organizations, all of which accepted the invitation.

⁹ In addition, two attempts were made to meet with the Governing Board of the Keweenaw Bay Indian Community, however, scheduling issues resulted in both being cancelled. Engagement of KBIC was subsequently ensured by participation of its CEO as a member of the project Planning Committee.

¹⁰ Purpose of the meeting also included requesting that KCF subcontract with RES to support the logistics, administration and public relations for the Blueprint project. Participated via Zoom.

¹¹ Participated via Zoom.

¹² An unincorporated association of hunters who meet periodically to address common issues and concerns of those who regularly hunt from deer camps on the Keweenaw Peninsula. Much of the membership and leadership overlaps with that of the Calumet Keweenaw Sportsmen’s Club.

In addition, following the first Planning Committee meeting, TNC conducted research on potential forms for the land's ultimate governing body(ies). TNC determined that it was most likely that the ultimate governing body(ies) would be governmental entities (versus nonprofit organizations). In addition, since the governing body(ies) might eventually acquire additional forest land located in other parts of the County, invitations to appoint planning committee members were extended to the remaining townships. Of the three remaining townships, only Sherman Township chose to appoint a member.

Overall, eighteen planning committee members were appointed by seventeen organizations:

Units of Government and Governmental Agencies¹³

- Eagle Harbor Township
- Grant Township
- Keweenaw Bay Indian Community
- Keweenaw County (two members)
- Keweenaw County Sheriff's Department
- Sherman Township

User Groups

- Calumet Keweenaw Sportsmen's Club
- Copper Harbor Trail Club
- Keweenaw ATV Club
- Keweenaw Snowmobile Club

Conservation and Historical Preservation Organizations

- Keweenaw Community Forest Company
- Keweenaw Land Trust
- Keweenaw National Historical Park Advisory Committee

Businesses and Economic Development Organizations¹⁴

- Keweenaw Convention and Visitors Bureau
- Keweenaw Economic Development Alliance
- Mariner North

Other

- Michigan Technological University

4. Stakeholder Survey

To further broaden stakeholder input, RES designed and launched a stakeholder survey. Where the interview, public and group meeting processes could provide a foundation for understanding the

¹³ Grant and Eagle Harbor Townships were selected for the initial membership invitations because the land for sale was in these two townships. Sherman Township appointed a member in December 2022.

¹⁴ Several other major businesses in the area might have been considered natural choices for planning committee membership. However, these firms had expressed interest in a private purchase of portions of the available land as part of the overall purchase and land transfer process. To avoid creating a perception of conflict-of-interest TNC and MDNR elected not to invite these firms to participate.

concerns most on the minds of leaders and meeting participants, the survey process was designed to gain a more detailed view of the perspectives of the public both in the Keweenaw, and beyond.

The interview process provided the basis for designing a survey that would examine the most pressing issues related to the Keweenaw Heartlands. Concerns raised by interviewees were used to both formulate questions and determine the prepopulated responses offered. Extensive use of open-ended response options ensured collection of information about topics or concerns that did not surface in the interview process.

RES considered the possibility of conducting the survey using a stratified random sample that would provide statistically reliable and valid results. However, the small population base of Keweenaw County made this impractical. Acquiring a reliable and valid sample in the area would have required approximately six hundred responses – more than one-in-three adults living in the area.

Reaching such a large portion of the population would have necessitated a very costly and extensive outreach plan, exceeding the available project budget. Ultimately, given the substantial number of responses and their consistency across various demographic and geographic groups, the data provide high confidence that the results are representative of the attitudes and opinions of Keweenaw stakeholders.

Several methods were used to ensure that survey responses could be segmented by diverse types of respondents. Principle among these were differentiation by principal place of residence and land ownership.

Different response collectors were also used to help determine the method by which respondents became aware of the survey. Four principal collectors¹⁵ were disseminated through:

1. Interviewees and local leaders – 43 responses
2. Public meetings, associated posters and local media – 435 responses
3. South Shore Association group meeting and membership email – 62 responses
4. Keweenaw Convention and Visitors Bureau email list – 1,345 responses

Overall, the survey collected 1,885 responses: 22% from respondents whose principal residence is on the Keweenaw Peninsula, 8% from the rest of Michigan's Upper Peninsula, 29% from lower Michigan, and 41% from elsewhere across the United States.¹⁶ Analysis of survey responses focused first on Keweenaw residents and landowners. Survey responses from other areas were compared with Keweenaw responses and were found to be remarkably consistent with them.

5. Data Summation and Planning Committee Review

RES conducted a detailed review of the interview, meeting and survey data and prepared a summation of significant findings. The Planning Committee reviewed this summation at its initial

¹⁵ A fifth collector was provided to an individual claiming to represent a large number of residents opposing continued public access to the Keweenaw Heartlands. No responses were received utilizing this collector.

¹⁶ Predominantly Wisconsin, Minnesota and Illinois, in that order.

meeting on Friday June 10, 2022. Based on these data, the Planning Committee worked through a set of structured exercises leading to the preliminary identification of sets of principles and values for management and for the governance of the Keweenaw Heartlands.

6. Iterative Drafting and Review of Blueprint Sections

All sections of this Blueprint were developed through an iterative process involving RES, TNC and MDNR, the Planning Committee and the public. This process took two forms, depending on the section under development. Sections that drew conclusions from data and made substantive recommendations for future action were subjected to a robust process with multiple rounds of reviews. Sections that provided descriptive and supportive material such as history, context or methodology, and the Executive Summary, were developed with a simpler process involving a single set of iterative reviews.

The process of generating sections that draw conclusions from data and/or make substantive recommendations included the following elements:

1. Review of related data by the Planning Committee using a structured process to draw Committee observations, conclusions and priorities from the data.
2. Prepare an initial draft based on Planning Committee input.
3. Review of the initial draft by TNC for accuracy, tone, and content.¹⁷
4. Review of the initial draft by MDNR for accuracy, tone and content.¹⁸
5. Prepare a revised version of the initial draft based on TNC and MDNR comments.
6. Distribute the draft to the Planning Committee with a structured homework assignment examining both content and structure of the section.
7. Compile homework results and present to the Planning Committee for discussion and determination of Committee-recommended changes.
8. Develop a second draft incorporating committee feedback.
9. Review of the second draft by TNC and MDNR.
10. Incorporate TNC and MDNR recommendations into the second draft.
11. Distribute the second draft to the Planning Committee for review with a structured homework assignment.
12. Incorporate Planning Committee recommendations into a semi-final draft.
13. Publish the semi-final draft on the project website for public review and comment.
14. Incorporate any additional changes warranted by public comments in the draft.
15. Edit, finalize and incorporate into the published Blueprint.

The process for Sections that provide descriptive and supportive material such as history, context, or methodology, and the Executive Summary included the following steps.

¹⁷ TNC review at various stages of the Blueprint drafting process also ensured that recommendations were consistent with its conservancy mission, as well as various regulations governing its nonprofit status. This type of review was necessitated by TNC's role in the purchase of the lands.

¹⁸ MDNR review at various stages of the Blueprint drafting process also ensured that any recommendations related to land that might be added to their Keweenaw holdings were consistent with requirements for lands under their ownership and management.

1. Prepare an initial draft.
2. Review of the initial draft by TNC and MDNR for accuracy, tone and content.
3. Prepare a revised version of the initial draft based on TNC and MDNR comments.
4. Distribute the draft to the Planning Committee for review using a structured homework assignment.
5. Incorporate Planning Committee recommendations into a second draft.
6. Review of the second draft by TNC and MDNR.
7. Incorporate TNC and MDNR comments into a semi-final draft.
8. Publish the semi-final draft on the project website for public review and comment.
9. Incorporate any additional changes warranted by public comments in the draft.
10. Edit, finalize and incorporate into published Blueprint.

7. Public Review and Comment

From the outset the Blueprint planning process included a collection of stakeholder contact information at every public-facing meeting and event.¹⁹ Collection methods included the suggestions made by stakeholders, interviewees, and TNC and MDNR staff and sign-up sheets at every public and group meeting. The survey also included a question requesting contact information of those desiring progress updates. Ultimately, contact information from 970 stakeholders was collected.

Keweenaw Area Community Foundation, the project's local logistical partner, agreed to house stakeholder contact information and to serve as the hub for dissemination of project updates. KCF hosted a project web-presence on its domain at: <https://www.keweenawcommunityfoundation.org/keweenaw-heartlands-project>. This website also provided interested parties with the opportunity to sign up for updates.

As noted above, every section of the Blueprint was posted online in semi-final draft form. Availability of each section was pushed out via e-mail to all stakeholders with addresses on file. In the e-mail, KCF invited stakeholders to comment via an email address created for this purpose.

As noted in the preceding subsection, all stakeholder comments received were considered in the final editing of this Blueprint prior to publication.

8. Blueprint Publication

Following completion of the iterative drafting and review process as described above, RES and TNC staff finalized this Blueprint for publication. RES commissioned a professional editor to review the draft and suggest edits for clarity, consistency, composition, grammar and readability. TNC engaged its communications staff to develop the final format for publication.

¹⁹ In nearly every case, stakeholders provided e-mail addresses as their preferred form of contact.