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Blueprint for the Keweenaw Heartlands

A guide to the governance and management of
the Keweenaw Heartlands in perpetuity.

Table of Contents

SUMMARY AND INTRODUCTION.....3

I. CONTEXT, IMPETUS AND RESPONSE.....5

II. METHODOLOGY AND STAKEHOLDER PARTICIPATION PROCESS.....10

III. PRINCIPLES AND VALUES FOR LAND MANAGEMENT19

IV. PRINCIPLES AND VALUES FOR GOVERNANCE.....35

V. RECOMMENDED GOVERNANCE STRUCTURE.....51

VI. ONGOING AND FUTURE WORK.....54

ACKNOWLEDGEMENTS.....64

REFERENCES.....66

APPENDICES.....68



Summary and Introduction

This *Blueprint for the Keweenaw Heartlands* (Blueprint) documents the collaborative process among the people of the area, the Michigan Department of Natural Resources (MDNR), The Nature Conservancy (TNC) and generous supporters that ultimately led to the acquisition of these lands for the benefit of the people, environment and economy of the area. Building on previous work that began the process of conserving portions of the Heartlands, the Blueprint offers a guide to the governance and management of the land in perpetuity. The context and impetus for development of the Blueprint are summarized in Section I.

Unlike a typical plan with a 3-to-5-year time horizon, this Blueprint is designed to serve for decades, even centuries, to come. Instead of focusing on goals and objectives, the primary focus of the Blueprint planning process was to develop an enduring set of principles and values to govern and manage the Heartlands in perpetuity.

For these principles and values to be followed over time, TNC and MDNR recognized that they must be developed by and reflect the interests of the people who live, earn their livings and recreate in the region. To accomplish this, TNC engaged RES Associates, LLC, a consulting firm with deep experience and expertise in conducting stakeholder-driven planning processes, to help rural communities build ongoing prosperity.

RES, working with TNC and MDNR, identified and recruited a 17-member Planning Committee. Its members represented the range of stakeholders, including local and tribal units of government, user groups, conservation groups, economic development organizations and local businesses. Over 18 months, this group developed the Blueprint based on an extensive public input process that included interviews, surveys, stakeholder group meetings and public meetings. More than a quarter of Keweenaw County's adult population and hundreds of additional stakeholders and visitors participated in the process. Sections of the Blueprint were posted online for public comment and pushed out to more than 1,800 interested parties who signed up for e-mail notifications. They were also publicized in local media. The Blueprint development process is described in detail in Section II.

Table I below summarizes the principles and values developed by the Planning Committee. Sections III and IV present them in detail. Based on these principles, the Planning Committee reviewed various governance structures enabled by Michigan law as well as those used for similar purposes in other states to develop a set of critical and desired features for governance of the portions of the Heartlands that is expected to pass into local ownership and management (versus the portions that would be acquired by MDNR). Working with TNC, the Committee forged the recommendation for a governance structure detailed in Section V and asked that TNC partner with the Michigan Legislature, local units of government and stakeholder groups to create it.

Recognizing that development of this Blueprint is just the beginning of work that will span decades and centuries, the Planning Committee finished its work by developing an outline of important ongoing and future work that should or must be addressed during or immediately following the transition of ownership and management to the new local governing entity. A rationale and description of this ongoing work is presented in Section VI.

As this Blueprint is published, TNC, MDNR, a stakeholder-based advisory committee and local units of government are working to create a governing entity to turn this Blueprint into reality. The goal of these efforts is to create a governing body with the principles and values described in Sections III. and IV. baked into its authorizing legislation and governing documents and embodied in its DNA. Chief among those principles is a call for robust, ongoing stakeholder involvement in the work of the new governing entity.

TABLE I: BLUEPRINT PRINCIPLES AND VALUES

MANAGEMENT PRINCIPLES	GOVERNANCE PRINCIPLES
<ol style="list-style-type: none"> 1. Adopt and Adhere to a Plan <ol style="list-style-type: none"> a. Plan inclusively b. Focus on the long-term c. Ensure sustainable revenue to cover operations and maintenance 2. Protect Resource Health and Values <ol style="list-style-type: none"> a. Maintain and increase environmental health and benefits b. Protect cultural and historic assets c. Sustain quality of life 3. Ensure Access and Balanced Use <ol style="list-style-type: none"> a. Preserve and balance historic uses b. Maintain and improve connectivity c. Separate incompatible activities d. Flex with changing times 4. Maintain Economic Contributions <ol style="list-style-type: none"> a. Prudently support the visitor economy b. Maintain a working forest c. Balance economic and other values d. Increase governmental revenues 	<ol style="list-style-type: none"> 1. Diverse, Representative Governing Structure, including: <ol style="list-style-type: none"> a. User groups b. Local government and KBIC c. Business/tourism/economic development d. Conservation/preservation 2. Balance Term and Tenure of Office: <ol style="list-style-type: none"> a. Term lengths ensure stability b. Limits on consecutive terms c. Attendance requirements 3. Principles-Based Management: <ol style="list-style-type: none"> a. Adhere to Principles/Values b. Data-based planning c. Equitable decision-making/ conflict resolution 4. Public Accountability: <ol style="list-style-type: none"> a. External guardrails/safety nets b. Ethical decision making c. Transparency/information sharing d. Inclusive strategic and operational planning 5. Organizational Competence: <ol style="list-style-type: none"> a. Professional management b. Board capacity building c. Sustainable revenue model

I. Context, Impetus and Response

Interest in the preservation of the environmental, economic, cultural and historical contributions of the Keweenaw Heartlands developed over decades as the people of the area, and others interested in the environment and culture of the area, recognized the unique and valuable benefits provided by these lands. This Blueprint documents the process that ultimately led to the acquisition of these lands for the benefit of the people, environment and economy of the area, and provides guidance for the governance and management of the land in perpetuity.



1. THE CONTEXT AND IMPETUS

In 2018, The Rohatyn Group (“TRG”), an asset management firm that owned more than 100,000 acres of forest land on the Keweenaw Peninsula of Michigan, initiated discussions with the Michigan Department of Natural Resources (MDNR) regarding acquisition of a large block of TRG owned land, primarily in Grant Township. After several years of dialogue with MDNR, TRG announced in 2021 that it was placing about fifty square miles of Keweenaw timber land on the market. Situated near the tip of the Peninsula and abutting state-owned park and forestlands as well as several existing conservancies, these lands are environmentally, historically and culturally important, and a principal attractor for the tourism industry that dominates the area’s economy.

They are also productive forestlands that have historically provided wood products and important environmental services such as carbon sequestration. The lands have been exploited for natural resources for millennia. The peninsula is one of two places in the world that produced native copper in quantities that allowed millennia of trade in the eastern half of North America, as well as sustaining modern industry for another century. These lands may hold untold riches of information, both historical and prehistorical, and their preservation and stewardship may help decipher untold stories of their historical and cultural significance.

This Blueprint refers to these lands as the “Keweenaw Heartlands” (or simply as the Heartlands). Figure 1. Shows the physical location of the parcels offered for sale, and their relationship to Nature Conservancy and state-owned lands in the area.

Over several decades, structural changes in the forest products industry gradually made the Keweenaw Heartlands less desirable to timber investors. In addition, heavy harvesting of the forests substantially reduced the stock of mature timber, likely requiring years of rest and regeneration before the area could regain profitability as a working forest. In 2018, TRG offered to sell these lands to the State or swap them for other lands the State owns which would be a better investment for forest products production. After-MDNR declined, TRG offered four large tracts totaling 32,661 acres for sale on the public market.

For generations, copper mining companies that originally owned these vast tracts of land, and the forest products companies that later acquired them, provided access for hunting, fishing, gathering and public recreation. The State incentivized this by offering significant property tax breaks for providing limited public access and managing the property as a working forest.

have the best chance to move and thrive in the face of threats from a changing climate. Preserving much of the area as forest provides protection for rare, threatened and endangered plant and animal species. The Heartlands were also the site of 7,000 years of human activity surrounding the extraction of copper, and potentially hold sites of world significance related to those activities.

Managing the land as a working forest also provides carbon sequestration benefits and can facilitate access to carbon credits, while maximizing the economic potential for area tourism. In addition, maintaining much of the land as a managed working forest provides a source of timber to support forest products industry jobs and preserves (or replaces) tax revenue that local governments rely upon.

The Nature Conservancy (TNC), a global conservation organization with a team of staff in Michigan, all fifty states and 79 countries, has long viewed this portion of the Keweenaw Peninsula as an outstanding environmental asset in critical need of protection. TNC has previously led successful efforts to conserve portions of the area and brokered the transaction in 2004 that conserved approximately 8,000 acres and many miles of coastline which were transferred to the Michigan Department of Natural Resources (MDNR). In addition, TNC retains ownership of and manages almost 3,000 acres on the peninsula in three parcels. These include:

- The Mary Macdonald Preserve at Horseshoe Harbor
- The Helmut and Candis Stern Preserve at Mount Baldy
- The Bete Grise Wetlands Preserve

In addition to the 8,000 acres of State Forest and State Park lands that the MDNR currently holds, the State of Michigan has interests in protecting the long-term environmental benefits and the economic and tourism value of the Heartlands. With the recent creation of the Michigan Office of Rural Development, the State has demonstrated an expanded commitment to supporting and building the economies of the rural areas across the state.

The prospect of private sale and potential parcellation of the land led a group of residents to form the Keweenaw Outdoor Recreation Coalition (KORC)¹, to bring stakeholders together and determine what steps could be taken to acquire the land for the benefit of the area. The KORC process helped develop a local sense of urgency and an understanding that preserving the benefits flowing from the land would require cooperation and balancing interests among diverse stakeholder groups. This sense of urgency led to a letter writing campaign to MDNR in early 2021, asking them to step in and purchase all the proffered land.

While State purchase of the lands appeared to many to be an easy solution, local and State experience from the earlier transfer of 8,000 acres to the Department of Natural Resources suggested that the State is not well positioned to manage all of the Keweenaw Heartlands to meet local objectives. While the 2004 transfer was followed by a robust local planning process which established goals and priorities for use of the land to support the area's economy and culture, MDNR leadership was clear from the outset that the agency likely would not be able to deliver on all of the plans the community developed. While MDNR's acquisition resulted in the property being heavily used for recreation, there was no mechanism provided by the statutes governing MDNR operations to address the other goals of the plan developed at that time, and those elements of the plan have languished.

By early 2021, the situation was nearing an inflection point, requiring concerted action or risking parcellation of the Heartlands and loss of its many environmental, economic, historic and cultural benefits. The Nature Conservancy was aware of the announced sale of the Keweenaw Heartlands and residents and other concerned individuals contacted the organization asking if it might consider getting involved in conserving the lands. TNC began to engage in informal conversations with MDNR leadership about the future of the Heartlands. In July of 2021, TNC staff traveled to Keweenaw County, met with local leaders and decided to see if the organization could enter into a partnership with the MDNR and the community to secure the Heartlands.

¹ Formed under the auspices of Keweenaw Community Forest Corporation, a local nonprofit active in conserving lands in the area.

2. THE RESPONSE

With TNC's history and understanding of the Keweenaw Peninsula, deep experience acquiring and preserving critical environmental assets and ability to access capital to engage in large-scale conservation projects around the world, MDNR understood that the Michigan Chapter of TNC was uniquely positioned to lead an effort to acquire the Heartlands and preserve its benefits for the people, environment and economy of the area. So, in August 2021, after almost a year of assessment and due diligence, the Michigan Chapter of TNC determined that it was critical to step up and help, so it formed a partnership with MDNR to do so.

TNC possessed the capacity and expertise to secure loans to broker and finance the purchase, and hold the land until a final governance, management and ownership structure could be developed and funding could be identified for the ultimate owner(s) to acquire the land from TNC. MDNR was highly interested in acquiring a portion of the land nearest the tip of the peninsula to connect its existing state forest and state park lands and secure access to some of the peninsula's most desirable and frequented features. It was also interested in acquiring easements protecting existing trails through other portions of the land.

However, TNC and MDNR both recognized that they could not go it alone in this process. Both organizations believed that it was critical to involve the people whose lives, livelihoods and lifestyles depend on the lands when determining how the lands would be managed and governed for now and for untold generations to come. The substantial public engagement facilitated by KORC demonstrated that the people of the area were highly invested in the future of the Keweenaw Heartlands.

Globally, The Nature Conservancy's commitment to recognizing and incorporating the rights of Indigenous and local communities is at the core of its conservation work. Its Human Rights Guide and curriculum direct this work and can serve as a model for how this work can and should be done in diverse places across the planet. While this Guide had been extensively used abroad, historically it had seen less application to projects in the United States.

TNC recognizes the principles embedded in the Human Rights Guide are equally important in developed countries such as the United States, especially in places like the Keweenaw where both the culture and the economy are deeply connected to the land and its resident population. Furthermore, from a practical perspective, all successful social compacts rely on voluntary compliance. If externally established rules about use of the land conflict with local values or foreclose the contributions the land makes to sustaining the lives and livelihoods of the people, then those rules will be ignored.

Therefore, both TNC and MDNR determined that a necessary part of that process would be to convene community stakeholders to build a shared vision and forge a plan (Blueprint) for decision making (governance), management, conservation and use of the land. That vision and plan would be created by the local community, led by an experienced, neutral facilitator, and ultimately inform the appropriate final, long-term ownership of the Heartlands.

The process envisioned would be highly participatory and built on the work of existing efforts and entities, such as KORC, to surface issues and resolve remaining differences. Such a plan would recognize and optimize the balance of recreational, civic, economic, environmental, public service and safety, tribal and other interests. It would also lead to vesting ownership of the bulk of the property in entities that have the trust of all stakeholders and are structured to maintain public accountability for decades, and even centuries, to come.

TNC solicited and received a foundation grant to support the desired planning project and to document the process used for the benefit of future projects. Following a national search to identify consultants with the capacity and experience to conduct such a process, in March 2022, TNC engaged RES Associates, LLC, and its principal John Molinaro for the visioning, planning and documentation aspects of this project.²

² RES is an abbreviation of Rural Economic Success.

Acquisition of the Keweenaw Heartlands was ultimately completed by TNC in late, 2022. This Blueprint details principles and values for the management and governance of the Keweenaw Heartlands, developed through an extensive stakeholder participation process described in following sections. The goal of this Blueprint is to inform the creation of the ultimate governing structure for the land and to provide the basis for its ongoing decision making.

II. Methodology and Stakeholder Participation Process

In March 2022, 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.³ 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 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.⁴ 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 the 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 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, long term natural resource management decision making processes need to be both informed and adaptable.



³ See Appendix I for information about RES Associates, LLC, and its principal John Molinaro, who led this process.

⁴ 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.

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 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 named this small group 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. Stakeholder group and public 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. The 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 15 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 an 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, 58 key stakeholders were interviewed, primarily between March 15 and May 31, 2022.⁵

TABLE 2: 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 6, 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

Table 2, above, summarizes the primary formal associations of the interviewed stakeholders.⁶ In addition, all stakeholders were asked how they personally used the Keweenaw forests and/or their trails, and their responses are summarized as well.

⁵ 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.

⁶ 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.

2. STAKEHOLDER GROUP AND PUBLIC 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 eight stakeholder group meetings and facilitated five 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 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, midpoint 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.⁷

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.⁸

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.⁹

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.¹⁰

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

⁷ Some attendees attended multiple meetings so are counted each time they attended.

⁸ 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.

⁹ 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.

¹⁰ Technical problems prevented video recording at Mohawk and truncated the recording at Copper Harbor during the question-and-answer period.

included an update on the acquisition, 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 the practical impacts of the change in ownership and 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 Copper Harbor at The Vue event center at Harbor Haus Restaurant. Approximately 25 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.

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 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.¹¹ 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 Meeting¹²
- Keweenaw Chamber of Commerce – Board Meeting¹³
- Houghton Keweenaw Conservation District – Annual Meeting
- Calumet Keweenaw Sportsmen’s Club – Membership Meeting
- Deer Camp Group¹⁴ – Board Meeting
- Keweenaw ATV Club – Membership Meeting
- Keweenaw ATV Club – Board Meeting

¹¹ In addition, two attempts were held 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.

¹² 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.

¹³ Participated via Zoom.

¹⁴ 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.

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 the 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 16 organizations, all of whom accepted the invitation.

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, 18 planning committee members were appointed by 17 organizations:

Units of Government and Governmental Agencies¹⁵

- 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 Organizations¹⁶

- Keweenaw Convention and Visitors Bureau

¹⁵ 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.

¹⁶ 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.

- 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 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 provided 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 collectors¹⁷ 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.¹⁸ 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.

¹⁷ 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.

¹⁸ Predominantly Wisconsin, Minnesota and Illinois, in that order.

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 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, 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 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.¹⁹
4. Review of the initial draft by MDNR for accuracy, tone and content.²⁰
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 them 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.

¹⁹ 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.

²⁰ 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.

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

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 the collection of stakeholders contact information at every public-facing meeting and event.²¹ Collection methods included the suggestions made by stakeholders, interviewees, TNC and MDNR staff and sign-up sheets at every public and group meeting. The survey also included a question requesting contact information from 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: 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.

²¹ In nearly every case, stakeholders provided e-mail addresses as their preferred form of contact.

III. Principles and Values for Land Management

This section outlines the key findings and recommendations for land management of the lands making up the Keweenaw Heartlands. These findings are based on the highly participatory community input process discussed in the previous section.

As noted earlier, the planning process focused on principles and values for management and governance because fundamental principles and related values²² tend to change much more slowly than technologies or social practices. They provide a basis for creating a Blueprint that can endure for generations and guide land management decisions over a long period of time.

The principles and values discussed emerged from interviews, stakeholder group sessions and public meetings which together involved more than 500 Keweenaw Peninsula residents, with the majority from Keweenaw County, as well as 1,885 survey responses, 22% from the Keweenaw Peninsulas. There was remarkable consistency across all sources and all geographic areas concerning desired principles and values for land management.

The Planning Committee for this process reviewed a summary of the interviews, group and survey results and engaged in a group process exercise to refine principles. RES Associates organized the results of that process and validated them with the Planning Committee before arriving at this summation. A discussion of the stakeholder input and relevant descriptions of current circumstances is provided in this section to help future decision makers understand the context and rationale for these principles.

Overall, the principles and values for land management fall into four meta-categories. Each meta-category will be discussed in detail, including related values that will help clarify them and provide a more detailed background. The four meta-categories include:

1. Adopt and Adhere to a Plan
2. Protect Resource Health and Values
3. Ensure Access and Balanced Use
4. Maintain Economic Contributions

In this section and the next (Governance Principles and Values), the order should not be taken as a hierarchy of importance. While there is a certain flow to the order in which they are described, and some principles may be dependent on others, each principle or value expressed is important on its own as well as in relationship with the others. *All the expressed principles are necessary, and none alone is sufficient to guide the management and governance of The Keweenaw Heartlands.*

MANAGEMENT PRINCIPLES

- 1. Adopt and Adhere to a Plan**
 - a. Plan inclusively
 - b. Focus on the long-term
 - c. Ensure sustainable revenue to cover operations and maintenance
- 2. Protect Resource Health and Values**
 - a. Maintain and increase environmental health and benefits
 - b. Protect cultural and historic assets
 - c. Sustain quality of life
- 3. Ensure Access and Balanced Use**
 - a. Preserve and balance historic uses
 - b. Maintain and improve connectivity
 - c. Separate incompatible activities
 - d. Flex with changing times
- 4. Maintain Economic Contributions**
 - a. Prudently support the visitor economy
 - b. Maintain a working forest
 - c. Balance economic and other values
 - d. Increase governmental revenues

²² Formal definitions generally focus on principles as being constants that do not change based on viewpoint, and values as being driven by viewpoints and moral or belief systems. The distinction between the two can often become blurry. We do not make the distinction in this Blueprint and use the terms together or separately to state a set of fundamental tenets that should undergird all future planning and management for these lands.

1. ADOPT AND ADHERE TO A PLAN²³

The principle of adopting and adhering to a plan was a consistent theme among interviewees and emerged from survey comments. Stakeholder comments about this principle can be summarized as: “Adopt a plan, publicize it and stick with it.” Interviewees and some survey comments also expressed a fear that the management of the land could become politicized and change direction with elections or changes in governing board composition, which underscores the need for a principles-based Blueprint and plan. This will be specifically addressed later in the section on Governance Principles.

Digging into the details of stakeholder comments, three related values emerged concerning the planning process and the resulting plan. They are:

- Plan inclusively
- Focus on the long-term
- Ensure sustainable revenue to cover operations and maintenance

a. Plan inclusively

Nearly all interviewees who mentioned the need for a plan also emphasized that the planning process should be inclusive of all stakeholders’ voices. Inclusivity was also a major theme emerging in group and public meetings. Interviewees identified many stakeholder groups whose involvement was considered critical, including organized and unorganized groups of users, elected representatives, landowners, Keweenaw Bay Indian Community members, public safety service providers, business owners, economic development organizations and conservation groups, to name the most mentioned.

When discussing types of user groups, most interviewees differentiated activities like snowmobile, ATV, hunting and mountain bike uses from other uses. The differentiator seemed to be the possibility that a use could create noise, hazards or other conditions that could disrupt the enjoyment of uses that were more contemplative, requiring quiet, solitude or similar conditions for their full enjoyment – activities typically referred to by interviewees as “quiet uses.”

However, the public input process clearly documented that membership in any particular stakeholder group is not exclusive, and most people use the land in multiple ways.²⁴ The 1,885 respondents to the survey identified an average of 5.48 uses apiece which did not break cleanly along expected lines.

A manual scan of survey respondents’ answers showed that most who participate in motorized uses, mountain biking or hunting also participate in several quiet uses. The response rate for motorized uses, mountain biking and hunting averaged 23 to 37 percent of respondents. The five most popular quiet uses were: tent camping, gathering (berries, mushrooms, etc.), kayaking, hiking and sightseeing, which averaged between 36 and 59 percent of respondents. Despite the potential conflict between these uses, significantly curtailing current uses was suggested by only one interviewee, no public or group meeting participants and only a handful of the 1,885 survey comments.

Another measure of Keweenaw Heartlands users valuing inclusivity in planning for the land’s management can be seen in survey respondents’ ranking the importance of potential benefits of the acquisition and conservation project. Among 19 benefits ranked by recipients, “protecting pre-settlement indigenous sites” and “protecting culturally important sites for the Keweenaw Bay Indian Community” (KBIC) ranked third and fourth, behind only protecting ecosystems, habitats and wildlife corridors and maintaining the tourism economy. Clearly

²³ By “plan,” we are referring here to this Blueprint, in conjunction with the results of the additional planning activities called for in the implementation section.

²⁴ The survey and interview processes asked respondents how they used the land but did not ask them to prioritize among their uses or pick a most important use.

respondents' sense of inclusivity extends well beyond recreational users and recognizes the importance of including the land's Indigenous people.

As discussed in earlier sections, this Blueprint focuses on high-level, long-term principles. Additional detailed implementation planning will be required to flesh out the operational details. To remain current and relevant despite social and environmental changes, operation and management plans and practices must be reviewed on a regular basis. There was a strong desire expressed in interviews and stakeholder meetings for continued inclusive involvement in this ongoing planning. One interviewee summed it up by saying that trust is essential for successful ongoing management, and continued engagement of stakeholders in ongoing planning is required to maintain trust.

Clearly, most stakeholders use and appreciate the Keweenaw Heartlands in a multitude of ways. They recognize the need to adhere to the principle that all stakeholders must be represented in the initial and ongoing planning as well as the governing processes.

b. Focus on the long-term

A frequent sub-theme among more than half of the interviewees who called for plan-driven management was the need for it to focus on the long term. This theme also emerged repeatedly in the survey comments. It was often in discussion around this issue that concerns emerged about the potential for rapid changes in direction that might be caused by political decisions or changing membership of the ultimate governing body.

One interviewee summed up the need for a long-term approach by pointing out that, across 9,000 years of history since the glaciers of the last ice age retreated, the overall character of and the human uses for the Keweenaw Peninsula have remained remarkably consistent. Hunting, gathering, fishing and extraction of its forest and mineral resources have been the predominant uses. The land has always held a spiritual significance, first to its Indigenous peoples, and more recently to countless residents and visitors who come to commune with its natural environment and restore a sense of balance and inner peace.

Other interviewees pointed out that the climate-adapted ecosystem is dominated by slow-growing hardwood forests that can take generations to fully regenerate when harvested in an overly aggressive manner. Residents with a forestry background point out that its slow-growing hardwoods produce the highest-value products which require patient, long-term management practices to grow to maturity. Environmentalists point to this long-term growth cycle as a management approach that can maximize carbon sequestration and storage.

One realization inherent in these interview comments was the concern that a private for-profit ownership and management structure with investor pressure to manage for short term gain would not protect these long-term values. Virtually all interviewees expressed, in some fashion, the need for a public or nonprofit management and governance structure to ensure management for long-term value rather than short term profits.

A fundamental principle in investment planning is that sources should match uses to maximize returns over time. In other words, the time horizon for making an investment should match the life of the asset securing the investment. The same principle applies equally to planning for environmental and cultural assets. Assets with a long-term value, like the cultural and environmental assets of the Keweenaw Heartlands, demand a long-term planning approach.

c. Ensure sustainable revenues to cover operations and maintenance

Another frequent theme among interviewees can be summed up in a comment from one participant: "It really doesn't matter what ends up in the plan if there aren't enough resources to implement it." Others called for a "sustainable revenue model," or "a viable business plan." How to pay for management was clearly on the minds of many stakeholder interviewees.

In addition, “How are you going to pay for management,” was a significant topic of discussion in every public and group meeting. Many participants expressed concern that the forests had been overharvested and, even if retained in a working forest, would need time to recover enough to generate sustainable returns for land management and maintenance costs.

The specific revenue streams used for management will undoubtedly vary based on the type of governmental or nonprofit entity that ultimately holds and manages the land. Each type of entity has access to a different set of tools for generating revenue. Nevertheless, a sustainable, viable business model that ensures revenues cover costs is an essential principle for this Blueprint and subsequent implementation planning.

2. PROTECT RESOURCE HEALTH AND VALUE

The second overarching principle that emerged strongly from all sources of public input can be summed up in the comments of one of the planning committee members. “Put the land first. Protecting and preserving it is a prerequisite to everything else.”

In stakeholder input about protecting Keweenaw Heartlands, three related values emerged:

- Maintain and increase environmental health
- Protect cultural and historical assets
- Sustain quality of life

a. Maintain and increase environmental health and benefits

Protecting and maintaining important ecosystems, habitats and corridors for wildlife was the single most important benefit ranked by survey respondents. It was the only benefit ranked as “very important” (the highest ranking) by more than 50% of the 1,608 survey respondents who completed the questions about importance of benefits (1,037/1,608 = 64.5%).

Interviews and group meetings provided a more nuanced view, not only of the importance of maintaining existing environmental health, but also of the clear opportunity to increase the environmental benefits of Keweenaw Heartlands.

Interviewees discussed the critical importance of the Keweenaw Peninsula as a stopover point for migratory birds crossing Lake Superior. Interviewees noted that these forests are home to some threatened plant and animal species, reportedly including some plant species that may not be found anywhere else.

Despite the previously mentioned concerns about overharvesting of the timber resource, stakeholders communicated that the forests of the Keweenaw Heartlands are still well stocked by a diversity of tree species. If a forest management regime that allows the forest to regrow and be managed for an older overall stand age can be implemented, these slow-growing forests are an ideal vehicle for sequestering carbon.

Just as their economic value will increase by allowing the forests to rest and regenerate, stakeholders highlighted that a sustainable forestry plan focused on strategic harvesting and selective cutting to maintain the diversity of age and species will increase the forests resilience in the face of disease, pests and a changing climate. In addition, implementing a thoughtful and appropriately designed forest management plan written for the area will maximize the forest’s value for wildlife and rare and threatened species; if it reflects the ecological services provided by the forest, provides a diversity of habitats and includes tailored management regimes that protect and enhance ecological values.

Stakeholders clearly embrace the environmental benefits of the Keweenaw Heartlands as being critically important and see preserving and increasing these benefits as a driving principle for their management.

b. Protect cultural and historical assets

Protection of cultural and historical assets is a critical principle, identified by a large majority of stakeholders in interviews, meetings and surveys. One interviewee very succinctly summed this up by saying, “There is 9,000 years of history in just three inches of topsoil.” Another pointed out that the Keweenaw Heartlands have not been surveyed since recent high-value archeological finds on Isle Royale, and likely host similar undiscovered sites.

The mining era of the peninsula is well documented by the Keweenaw National Historical Park and its 21 partner sites. However, the earliest post-colonization mining and early European settlement sites are likely on the lands preserved by this project. These sites have not yet been fully inventoried or protected. Some stakeholders noted that even the tailings left behind from mining have significant value. They are popular with rock-hounds and are reportedly the source of at least one mineral specimen not found elsewhere.

Protecting pre-European settlement Indigenous sites, culturally important sites for the KBIC, historical sites from the mining era and sites from early European trading and settlement ranked third, fourth, fifth and sixth in importance among 19 benefits ranked by survey respondents. No lower ranked benefit achieved an average ranking of “important” or above (3.0+ on a scale of 0.0-4.0).

Protecting cultural and historical assets is therefore a high priority value for managing the land. Interviewees with a historical, environmental or geological background all emphasized the need for a detailed site survey before any project proceeds which will disturb the land.

c. Sustain quality of life

Sustaining the quality of life, often described as preventing overdevelopment or maintaining the character of the area, was the single most-cited concern of survey respondents. It was cited by 69.3% of survey respondents as a major concern. The same value came through strongly in interviews with more than two thirds of the interviewees mentioning it as a major concern. It was also a significant, but not quantifiable, theme in group and public meetings.

The term overdevelopment, or the principle of sustaining quality of life, were also used as shorthand for describing patterns of development that would significantly restrict historical and cultural uses of the land - like hunting, fishing, gathering, hiking and back-country camping.

While the concepts of “quality of life” or “overdevelopment” are subjective, interviewees were relatively consistent in their descriptions of what it could look like. “We don’t want another Disneyland,” was the single most consistently used expression of this principle. The development of large resorts, waterfront homes and condos, chain hotels and fast-food restaurants were also cited as signs of overdevelopment.

The issue of overdevelopment or overuse was also conflated with the problem of not enough amenities to support the current level of visitors. Some of the impacts, like visitors leaving behind garbage or using roadside ditches as latrines, can be addressed by investments in visitor amenities as discussed later. However, development of visitor amenities might attract even more users as the experience becomes more positive and inconveniences are removed.

Development that would force significant reduction or cessation of traditional uses was also viewed as overdevelopment that affects quality of life. Hunters, for example, mentioned how lots leased or sold for cabins significantly restrict their ability to safely hunt in certain areas. Snowmobilers and ATVers also mentioned the impact when a business sale or expansion forces them to reroute developed trails. All would say that activities and uses like these reduce their enjoyment of the lands and diminish their quality of life.

Among all the principles and values expressed, sustaining quality of life is likely the most subjective and most subject to change over time. There are currently many residents who are fine with life without smartphones and oppose construction of cell towers that might mar their view. However, many users, particularly visitors, are more dependent on the technology. There are new and better ways to camouflage towers. Also, local Emergency Responders see better coverage as a public safety necessity, rather than an unsightly convenience.

To safeguard quality of life, most interviewees saw the need for a highly representative local governance structure for the lands. The general view was that a governing body composed of a diverse group of local stakeholders could best balance quality of life with development pressures and tourism impacts – if it is guided by principles that include sustaining the quality of life.

3. ENSURE BALANCED ACCESS

The third overarching set of principles and values for management of the land can be summarized with “Ensure Balanced Access.” Significant loss of the extensive, and mostly unregulated, use of these lands by community members and visitors was an overarching concern, and yet, the impacts of unrestricted and increasing use of the lands was an equal, albeit conflicting concern. Balancing use with conservation was acknowledged as a necessary and challenging desired outcome.

Virtually everyone interviewed or surveyed cited multiple ways they use the Keweenaw forests. Many of those uses depended upon the unusual degree of public access tolerated by the former landowners. The access granted goes far beyond the hunting and fishing foot-access required by the State for lands taxed at reduced commercial forest rates. This level of access appears to be unique among large tracts of land in Michigan and rare anywhere in the United States. The landowner’s tolerance of it appears to be largely based upon the fact that these uses didn’t significantly impair their commercial use and economic returns, and likely would have not been so casually tolerated if they had. Even so, there were occasional references to gates, berms and road and trail closures when previous landowners deemed them necessary to protect their interests.

Nearly unrestricted access to the land for multiple uses has been a feature of its management for generations, and the culture and economy of the area have become rooted in that access. Many of the most popular coastal features located on current State land can only be accessed by the public by crossing the Keweenaw Heartlands land, so maintaining access to and through this forest is viewed as critical to the people’s use and enjoyment of the area’s most popular sites and features.

While each has an established trail system where most of their use occurs, ATVers, snowmobilers and mountain bikers enjoyed off-trail access to almost all the former TRG acreage without enforcement of any restrictions established by owners, laws or regulations. For instance, it was common for hunters to use their ATVs to access hunting camps and blinds and haul out harvested game almost anywhere in the forest. At the same time, quiet users report that motorized, hunting and mountain bike use can imperil them or diminish their enjoyment of the land, suggesting that some uses do not go well in the same places.

While these uses when confined to the trail network generally do not have a negative impact on natural resources, off trail use appears to be the primary cause of negative impacts to sensitive ecological and cultural sites as well as the most common form of trespass onto adjacent private property. Also, growth in off trail use is a burden on public safety and first responders. Finding and rendering aid to a resident or visitor who needs assistance on the trail network is a much simpler task than finding someone who is off the network. Effectively curtailing unsafe behavior, while challenging on the trail network, is virtually impossible off the network. It is highly unlikely and inconsistent with responsible management for all uses to be continued exactly as they are now. To balance uses and reduce conflict, some will likely have to be modified or limited as to where they may occur.

In addition, the interview responses clearly show that the previous management scheme for the land did little to balance its various uses with resource protection. Relatively unrestricted access to the entire area, coupled with the lack of any comprehensive survey of critical environmental, cultural, historical and geological assets, provided little or no protection for these resources.

Four related values emerged from the interviews, group and public meetings and surveys, as refined by the planning committee. They are:

- Preserve and balance historic uses
- Maintain connectivity
- Separate incompatible activities
- Flex with changing times

a. Preserve and balance historic uses.

The range of current and historic public uses for the Keweenaw Heartlands is unusual across the US. A prepopulated list of 16 common categories of use was provided to survey respondents. All 1,885 respondents answered this question and only 15 selected “none of the above,” but 369 (20%) listed some other use or a refinement of the uses listed. On average, respondents used the land in five and a half different ways. The survey was not designed to determine which use might predominate for a specific user, or, for visitors, whether a specific use precipitated their trips to the Keweenaw Heartlands, leading to the additional uses selected. The survey also did not identify where on the lands the respondent was engaging in their preferred activity. The prepopulated uses and their response rates are listed in Table 3, below.

TABLE 3: USES OF KEWEENAW FOREST LANDS BY SURVEY RESPONDENTS

Use of Land	Percent	Number
Hiking, geocaching or orienteering	60%	1,127
Sightseeing	59%	1,118
Mountain biking	37%	703
Kayaking or canoeing	37%	695
Gathering - berries, mushrooms, firewood, medicinal plants, etc.	37%	688
Tent camping	36%	682
Riding off-road vehicles like 4x4s, ATVs or side-by-sides	32%	597
Amateur or professional nature photography	30%	570
Snowshoeing	29%	543
Hunting, fishing or trapping	27%	515
Cross-country skiing	23%	431
Snowmobiling	23%	429
Motorhome, trailer or pop-up camping	22%	407
Birding	21%	399
Downhill skiing	17%	311
Rock climbing	7%	140
None of the above	1%	15
Other	20%	369
Total Respondents	100%	1,885
TOTAL RESPONSES		10,339
AVERAGE PER RESPONDENT		5.5

Interviews, group and public meetings and surveys also established a strong desire that the land be managed in a way that preserves as much of the historic access and related uses as possible. This topic was brought up without prompting in more than three-quarters of the interviews (46/58). In the survey, loss of access was divided into four questions related to quiet uses, motorized uses, mountain biking and hunting/fishing/trapping/gathering. Protecting these uses was cited as a major concern by 54%, 45%, 40% and 33% of respondents, respectively.

Group and public meeting opinions cannot be quantified; however, concern for maintaining and balancing access was raised by participants at every meeting and was the predominant topic of conversation in meetings with user groups. In fact, across the entire range of interviews and meetings, only one of the 500+ participants publicly expressed a desire to have most allowed existing uses curtailed or eliminated. There were, however, some participants that expressed concerns about negative impacts of specific currently allowed uses or that made comments suggesting that destructive or illegal uses like defacing landmarks, roadside camping, unpermitted cutting of timber and collecting Indigenous artifacts are problems that should be addressed.

An important nuance of stakeholder discussion was that, while the allowed current uses should be valued and maintained, they cannot and should not be accommodated everywhere within the property. Most participants that discussed this said something like: "There's plenty of room to allow all the current uses, just not all in the same places." The same discussions often also cited lack of resources for enforcement of existing rules.

Despite the nearly universal support for maintaining as much access as possible, planning committee members expressed surprise at one outcome related to access to the land. Nearly 90% of all survey respondents either definitely (66.3%) or potentially (23.6%) supported levying a modest user fee to help cover costs of developing, operating and maintaining facilities and services used by visitors. In the associated comments, potential supporters of a fee wanted to know how large a "modest" fee might be, specifically how it would be used and if it would be levied on those whose property taxes now support nearly all visitor services.

In addition, many stakeholders expressed concerns that at some point the cumulative impact of visitors may exceed the capacity of the land's ecosystems to regenerate over time. One planning committee member and several survey comments suggest that, as is the case with many of the more popular National Parks, some form of a quota system may have to be created eventually if the impacts of visitor use continue to grow.

The principle of preserving a balanced mix of all current uses comes through loud and clear in all forms of stakeholder input. Moreover, a vast majority supports charging users a modest fee to help support management and use of the land. However, since many popular features, trailheads and other attractors are accessed from public highways, it may be difficult to design an effective user fee system. An entry fee like the one used by Michigan's State Parks is unlikely to work, so other models must be found to implement this concept. Other models, such as parking fees, or app-based fee collection might be more amenable to this situation but will require further research.

b. Maintain and improve connectivity

Interviewees and group and public meeting participants repeatedly stressed that part of what makes the Keweenaw Heartlands unique is its interconnections. Trails connect not just communities but outstanding natural vistas, environmental gems and world-class geological and cultural heritage sites. The large tracts of land and surrounding waters also provide interconnections vital to the health of various species of plants, animals, fish and birds native to or migrating through the area.

The interconnections were cited as multiplying the value of every use of the land. The wildlife corridors enhance the natural experience of users and assure the health and resilience of wildlife populations. The sheer variety of the experience builds, layer on layer, into a whole that is far greater than the sum of its parts.

Maintaining connectivity will also require a constant balancing of interests. The ideal routing of a motorized trail for ATVs or snowmobiles could disrupt connectivity between critical habitat for species that do not adapt well to the associated noise and activity. This points to the need for a better inventory and study of the various environmental and ecological systems in play in the area. If we do not understand the interconnections, we cannot consider them when balancing interests.

In addition, stakeholders report that access to some major points of interest has been lost, and, in some places, existing roads and trails may disrupt wildlife migration and species propagation. Improved connectivity may need to be created, where appropriate, in areas that have previously been blocked from public access. In other areas, building new trails should be considered to connect communities and points of interest via hiking and possibly other uses. Meanwhile, changes to existing use patterns or new connections may be needed to address barriers to wildlife migration and species propagation identified by inventories of ecological systems.

All these activities must be balanced to respect the needs of all stakeholders – including the Keweenaw Heartland’s environment. In addition, maintaining connectivity and separating incompatible uses (described in section 3.c., below) will require careful balancing, especially if certain sections are set aside for uses limiting access for other types of uses. The balancing of these interests must be conducted through a process that involves all stakeholders – and provides an equal voice for the environment and native species.

Maintaining connectivity is a principle that supports and enhances many other principles in this Blueprint. It is foundational to the value derived from all the uses of the land.

c. Separate incompatible activities

The idea that not every use should be permitted everywhere, or all the time, was a prevalent principle. It was proposed primarily in interviews, public meetings and the meeting of south-shore residents. It also shows up in various places in the survey comments but was not a specific subject of the survey. The principle of balancing uses is inextricably linked to this principle. Balancing uses requires attention to their compatibility.

One example reinforcing this concept was expressed by an interviewee. He told the story of his mother, who was walking along a street that also serves as a common snowmobile route and was run into by a snowmobiler who left her lying on a snowbank with a broken leg. As a snowmobiler himself, the storyteller wasn’t blaming the snowmobiler for the accident (although he was clearly upset by its hit-and-run aspect). He was citing it as an example of how some uses don’t mix.

Other frequent themes about incompatible uses concerned:

- Hikers who barely escaped being run over by mountain bikers using trails that are not part of their separate trail network,
- Birders who mentioned that motorized users disrupt their birding,
- Foragers and hikers who don’t feel safe anywhere in the woods during deer season, and
- Motorhomes that trek the unimproved road to High-Rock Bay and spoil the view for everyone else.

Quiet users are not the only ones reporting conflicts. Hunters express concerns about hikers who take to the woods in deer season without donning high-visibility clothing. Groups with organized trail networks mention conflicts when visitors on foot take the “easy path” of the dedicated trail and risk collisions when vehicles or bikes come upon them quickly in areas of limited visibility.

Nearly everyone endorsed the principle that there is room for balancing every currently allowed use, but that some uses should be separated as much as possible. A related corollary is that the full range of users should be afforded access to the most popular places where possible and consistent with protecting the land.

d. Flex with changing times

Twenty years ago, mountain biking was almost unheard of on the peninsula, and today it is one of the most prevalent attracters of tourism. Twenty years from now, snowmobiles and ATVs may run on quiet electric drivetrains rather than gasoline engines, likely affecting their range and requiring charging stations, but this may also have other impacts like reducing impact on wildlife and increasing the enjoyment of quiet users.

As stated earlier, we cannot know what society will look like or what technologies will be in use generations or centuries from now. Nor can we know what forms of recreation will be popular. The principle of maintaining flexibility about how the land is accessed and used was repeatedly suggested in interviews and was an undercurrent in comments in meetings and the survey.

Clearly, stakeholders want to avoid creating an immutable set of rules and lists of allowed uses for all times. The process for developing detailed management plans for the land should adhere to the principle that it must adapt to changing times, technologies and cultural practices.

4. MAINTAIN ECONOMIC CONTRIBUTIONS

The lands of the Keweenaw Heartlands have provided major economic benefits to the people who lived in the area, as well as the people who controlled the use and management of the area's natural resources. Copper traded from the peninsula in pre-historic times has been found as far south as the Gulf of Mexico. Archeological records from Isle Royale indicate that the forests provided a variety of products supporting its Indigenous people. During the industrial mining era, in addition to the copper that was mined, the forests provided timber for the mines, firewood for homes and berries, mushrooms and game for people's tables.

As a working forest, the land has provided jobs in the timber industry and, because of the broad public access, has been a catalyst for the development of the region's tourism industry. The outdoor activities and quality of life afforded by the forests help Michigan Technological University and other major employers attract and retain staff. If the forests were locked away from economic uses, such as supporting the visitor and forest products sectors, it would devastate the economy of the area.

In addition, one of the key principles for sustaining and building rural economies, especially when those economies are natural resource dependent, is to build local ownership and control.²⁵ Local ownership and control allows a rural economy to capture the profits generated by its local assets, such as natural resources or scenic beauty. In addition, when ownership and control are in local hands it substantially increases the likelihood that rural assets will be managed to maximize long-term value and reduce degradation.

Extensive research into the impact of resource extraction on rural communities has documented an often-repeated pattern of distant investors maximizing their financial gain by externalizing associated environmental and social costs.²⁶ Local residents, or society as a whole are then left with the costs of environmental remediation, reforestation, rebuilding a viable local economy, etc. Rural people have a strong incentive to protect the value of the assets that support their economy and way of life over the long term and prevent the degradation of vital assets.

Maintaining the economic contributions of the forests was a major concern that emerged across the interviews, group and public meetings and surveys. It emerged as a central principle for ongoing land management. Four related values clarifying this principle surfaced when analyzing this input:

²⁵ The Ford Foundation, in cooperation with The Aspen Institute Community Strategies Group and others, has researched and developed a systematic framework for building rural economies called WealthWorks. A central tenet of the framework is to address the historic pattern of exploitive extraction of rural wealth by building more local control of the assets that support rural economies.

²⁶ Ibid, and many others

- Prudently support the visitor economy
- Maintain a working forest
- Balance economic and other values
- Increase governmental revenues

a. Prudently support the visitor economy

In 2020, the most recent year on record, the visitor economy (retail, accommodations and food service and recreation sectors) provided just over half (54%) of the jobs in Keweenaw County and tied with the construction sector for total payroll. However, employment in all other fields provided significantly more compensation to their workers, ranging from 150% to nearly 300% additional average annual income per job.²⁷

This data does not reflect the contribution of business profits from the county’s 33 tourism-dependent businesses (56% of all private businesses) to the County’s economy. Owner income has a disproportionate impact on the county economy given that tourism businesses in the County are mostly locally owned and averaged just five employees, increasing the relative contribution to the economy compared to an area with a higher proportion of larger or absentee-owned firms.²⁸

Visitor contributions to the overall economies of Keweenaw and Houghton Counties are very significant, as shown in Table 4. Since Keweenaw County lacks sufficient lodging, eating or retail establishments to service visitor demand, a significant portion of the visitor revenues and tax collections in Houghton County are likely a direct result of visitor interest, primarily due to Keweenaw County attractions. At the same time, without the lodging, dining and other amenities available in Houghton County, Keweenaw County could not service the current tourism volume and would likely see a major reduction in visitors. Clearly, both would suffer irreparable economic harm without the contributions of the other.

TABLE 4: VISITOR CONTRIBUTIONS TO KEWEENAW AND HOUGHTON COUNTY ECONOMIES, 2021

Expenditure Type	Houghton County (millions)	Keweenaw County (millions)	Total (millions)	Keweenaw Percentage of Total	Houghton Multiple of Keweenaw
Lodging*	\$27.75	\$8.49	\$36.24	23.4%	3.27
Food and Beverage	\$19.81	\$4.34	\$24.15	18.0%	4.56
Retail	\$14.03	\$2.77	\$16.80	16.5%	5.06
Recreation	\$7.42	\$2.85	\$10.27	27.7%	2.60
Transportation**	\$15.20	\$3.10	\$18.30	16.9%	4.90
Total	\$84.20	\$21.55	\$105.75	20.4%	3.91
State & Local Tax Revenue	\$8.7	\$2.2	\$10.9	25.3%	3.95

Source: Michigan Economic Development Corporation, 2021 Tourism Economic Impact - Region and County

*Includes second homes

**Includes local and air transportation

²⁷ Some higher-paying jobs essential for tourism, such as park ranger or forester, are reported under other sectors, so the impact of tourism on wages is not fully reflected in these figures.

²⁸ Source: US Census, County Business Patterns, 2020

While the reported figures for the two counties do not break out visitors attracted to Houghton County for activities that do not involve recreation in Keweenaw County, the relative draw of the two counties can be inferred by the ratio of direct recreation expenditures between the two. Assuming that direct recreational expenditures in the two counties is a reasonable proxy for their proportionate attraction of visitors, then Houghton County benefits from Keweenaw County-attracted tourism by approximately \$28.17 million per year.²⁹ By this estimate, Houghton County receives about 31% more visitor income from demand generated by Keweenaw County attractions than does Keweenaw County.³⁰ While this calculation is imperfect, it does demonstrate the scale of the interdependence of the two counties' visitor economies and the economic importance of the counties to each other.

Perhaps in recognition of these economic contributions, survey responses among Houghton and Keweenaw County respondents ranked maintaining the tourism economy as their most important economic concern, with a score of 3.13 on a 4-point scale (between important and very important, n=223). No other economic concern reached the level of importance (3.0) on this question.

Interview and public and group meeting responses were less clear on the importance of maintaining the visitor economy. Only 3 of 58 interviewees spontaneously mentioned maintaining the visitor economy as a concern; however, the interview protocol did not specifically include this question. The top concern cited – maintaining access for the range of current activities – suggests that maintaining access for visitors is very important among interviewees. Notes and recollections from group and public meetings suggest that maintaining the visitor economy did not directly come up; however, it was certainly implied by the many comments about maintaining public access to the land.

Concerns of Keweenaw County landowners³¹ completing the survey (n=247) provide a more nuanced look at the visitor economy. The second, third, and fourth most highly expressed landowner concerns (after increases in property taxes) all related to the possible impact of increased tourism. They included: increased tourism making it less pleasant to live and work in the area (41.7%), increased traffic making it harder to get around (38.1%) and increased demand for public services like law enforcement, emergency medical services and fire protection (32.9%). Interview respondents reinforced the significance of these concerns by citing overdevelopment as their single biggest concern for the future of the Keweenaw Heartlands, as discussed in section 4.c., below.

Taken together, the economic importance of Keweenaw Heartlands to the two counties, the ranking of maintaining the visitor economy as the most significant economic concern of survey respondents, and the major concerns about the potential impacts of increased tourism or overdevelopment, suggest that a measure of caution is required when steps may be made to increase the tourism economy. This is why we qualified the principle by including "*prudently support*" in stating this principle. Clearly, the economic benefits of additional tourism must be balanced with careful planning to minimize any related negative impacts.

One related suggestion that arose in several interviews and a few survey comments is about using education to temper the impact of tourism on the land. There may be significant value in marketing the area based on these principles and values to encourage visitation by people who share them. Including an educational component promoting respectful treatment of the land wherever possible in the visitor experience may be another way of building a more respectful visitor base over time.

²⁹ Calculated as follows: \$21.55 million Keweenaw County visitor contribution times a Houghton County recreation expenditure multiple of 2.6 = \$56.06 million in expenditures likely due to direct attraction by Houghton County attractions. Subtracted from Houghton County total of \$84.20 million = \$28.17 million in likely Houghton County derived economic benefits due to Keweenaw attractions.

³⁰ The method used for these calculations is a proxy that illustrates the issue and not a scientific way to quantify it. The research required for a more reliable estimate is beyond the scope of this Blueprint process.

³¹ Respondents owing land in Keweenaw County regardless of the address of their primary residence.

b. Maintain a working forest

Since the decline of the copper mining industry more than 50 years ago, the working forests of the Keweenaw Peninsula have been a mainstay of its economy, providing management and logging jobs as well as providing raw materials to regional industries and craftspeople. And for the century prior, the forests provided the critical building materials and fuel that were needed to support the copper mining industry in this very remote location. Today, forest-related industries, including manufacturing of forest related products, continue to be significant contributors to the Upper Peninsula's economic output.³² Survey respondents ranked maintaining a sustainable working forest as the second most important economic benefit desired from the acquisition and conservation of the lands, after maintaining tourism.

The more nuanced information gathered in interviews and meetings clearly shows that most people believe that, in recent years, these forests have been overharvested and will need a different, more sustainable management approach to recover and to regain their economic and environmental value. Stakeholders familiar with the forest industry expressed concern about the ability of the forests to generate sufficient revenue during this period of recovery and regeneration to pay for management expenses, including support of local government through property taxes or payment in lieu of taxes.

In addition, the economic contributions of a working forest are not limited to logging alone. Management for sequestration of carbon and creation of carbon credits was cited as having real economic potential for the Keweenaw Heartlands forests. The recent management of the forest has resulted in a younger, more rapidly growing forest, which creates the opportunity to generate carbon credits under the application of a more balanced management approach known as an improved forest management standard. The use of revenue generated by the sale of carbon offset credits was often mentioned as a possibility to help support management through this period.

Other non-timber forest products were cited as potential contributors to the region's economy. Portions of the forest may be suitable for production of maple syrup, potentially governed by a lease or permitting process that favors local ownership and control.³³ Similar leases or permits could be provided for other non-timber forest product production, such as growing mushrooms or native medicinal or collectible plants. An example of this may be the common practice, in Appalachian forests, of private small-parcel landowners planting ginseng to gain annual income between harvests of mature timber.

Another theme among many commenters was that a well-managed working forest supports both a healthy environment and the tourism economy. If management is unsustainably aggressive, it can affect both the productive capacity and the aesthetic appeal of the lands, potentially impacting tourism, the forest products sector and the environment. Several stakeholders with a forestry background expressed the opinion that the Keweenaw Heartlands forests are nearing or have passed this point.

However, the steady increase in area tourism despite the intensive harvest practices of recent owners demonstrates that forestry and tourism are not necessarily incompatible. MDNR's experience in other working forests around the state provides additional evidence and shows that forestry and tourism can be highly

³² Because of data suppression issues and the export of much of the timber harvested in the area to mills located outside the area, accurate estimates of the effect of forest-related industries on GDP and employment are not readily available. Keweenaw forests are held and harvested by firms with operations in multiple locations across Michigan (and beyond). GDP contributions of firms in an industry that span multiple locations within a state are not reported in a fashion which readily permits localization by county. Similarly, employment is often reported by companies based on payroll office location rather than geographic place of employment, further complicating accurate estimates. The relatively small number of firms physically located in the area also results in data suppression which, in turn, makes segregating economic impact of forest-product related industries very difficult and beyond the capacity of this study.

³³ Maple syrup production may also provide opportunities for agro-tourism.

compatible. Substantial research also concludes that a sustainably managed working forest provides more environmental benefits than a hands-off approach.³⁴

The principle of maintaining most of the land as a working forest is therefore an important support for other economic and environmental principles and values for managing the land.

c. Balance economic and other values

Stakeholder opinions about the relationship between the forest and growth of the Keweenaw Heartlands' broader economy are highly nuanced. Maintaining the tourism and working forest contributions to the economy were rated as important in surveys. The critical contributions of both were significant, consistent themes in interviews and group and public meetings.

Growing the tourism economy, while ranked and discussed as important, was also viewed with concern by many, even among its supporters and entrepreneurs dependent on it for customers. There is considerable tension between stakeholders wanting to see more services and amenities to serve visitors, and the potentially damaging effects of overdevelopment and large increases in tourism.

In public meetings, participants expressed a desire for amenities to accommodate current residents and visitors and to address the negative effects from lack of basic facilities like trash cans, parking areas and public toilets. However, they were equally expressive of concerns about impacts from more visitors if those amenities were developed.

Similarly, the biggest single concern among survey respondents was overdevelopment. This concern was consistently among the top-rated concerns of both residents and non-residents of the Keweenaw Heartlands and was discussed in more detail previously in the section about the principle: "Protect Resource Value."

Part of the balance stakeholders generally desire for forest management requires use of some land to meet public and economic needs and goals while conserving the bulk of the land for environmental, recreational and managed forest uses. The range of potential uses supported in interviews, meetings and surveys included using some land for workforce housing, amenities such as parking, campgrounds, trails, toilets, public purposes such as water and sewer systems, economic development, and development of more permanent resident housing, particularly affordable housing.

The consensus appears to be that a percentage of the land can be allocated for such uses if carefully vetted for environmental, scenic, cultural, historical and other potential conflicts. Discussion in the planning committee and some interviews suggested that all the "right" parcels to make available for these purposes could likely not be identified in advance, and no list of pre-approved uses could balance the needs and interests of stakeholders over an extended time horizon. Given the large amount of land involved, permitting development of even a small fraction, perhaps 5 to 10 percent, could meet major local needs for decades to come, if carefully planned and managed.

While use of some lands for these public and economic benefits was broadly supported, there was also a clear consensus that procedures must be developed to reduce potential harm. Those with the most detailed expertise about local environmental, historical, cultural and geologic assets all reported that no comprehensive survey of the lands has been completed to determine which sites warrant special protections. A consensus emerged in stakeholder and planning committee discussions that there must be a robust set of procedures in place to vet any future out-sale, development or land-use management decisions to identify and ensure protection of

³⁴ If the regenerative effect of natural processes, such as periodic fire or disturbance by wind is suppressed to protect human development and use and is not replaced by management of the forest in a way that emulates the effect of those natural processes, overmature temperate forests generally enter a degenerative state where forests release more carbon than they trap, they support less wildlife, and biodiversity decreases compared to a younger forest.

irreplaceable assets. Over the longer term, as resources become available, detailed surveys should be conducted to identify areas requiring special protection.

Local stakeholders reported a desire for the Keweenaw Peninsula to be a place where their children could envision and build a future that both provides reasonable economic opportunities and maintains the quality of life. The principle of maintaining an appropriate balance between economic and other values, and of carefully and thoughtfully reserving and using a portion of the land to meet long term public needs, may be the most difficult challenge that will be faced long term for the Keweenaw Heartlands.

d. Increase governmental revenues

A consistent concern raised in most interviews and all group and public meetings was maintaining the current level of revenues that local units of government receive from the land. If the land were to be moved into nonprofit or governmental ownership, local units of government would lose their current tax revenue from it; however, other revenue sources like Payments In Lieu of Taxes (PILT) could be used to replace this tax revenue. Many respondents also looked beyond simply maintaining current revenues, pointing to a severe need for more money to pay for the services that visitors use.

Interviewees and others familiar with the funding of local government operations pointed out that Michigan's revenue model for supporting basic public services doesn't work well for Keweenaw County. This is an issue for most rural areas in Michigan with small populations and significant public or commercial forest lands, particularly if those areas receive large influxes of transient visitors.

The 2020 population of Keweenaw County was estimated by the US Census as only 2,107 people living in 1,079 households.³⁵ On any given weekend the county may see thousands or tens of thousands of visitors, placing a huge demand on public services and infrastructure such as emergency response, public restrooms, trash removal, road maintenance, etc.³⁶ For example, during his interview the Grant Township Superintendent reported that the toilet paper bill for the only public restrooms in Copper Harbor is larger than that of the largest dormitory at MTU.³⁷

Outside of the Fort Wilkens State Historic Park which is supported by entrance fees, camping fees and state appropriations, the predominant funding source for these public services is the local property tax (the exception being road maintenance, which is supported by a blend of state and local resources). However, the property tax base of Keweenaw County is very small, and the tax structure for property does little to capture the economic activity of the tourism sector. As a result, while visitors enjoy the amenities and services provided by the local units of government, local property owners pay higher taxes to support services that are spread over too large a demand.

Like many rural areas, critical services like fire and EMS response rely on a small cadre of volunteers. The current volunteer base is not adequate to meet the demands of their fellow residents as well as the increased demands created by visitors to the region and the current tax revenue is inadequate to fund full-time paid emergency service personnel.

³⁵ There are approximately 1,000 additional residences, likely used by seasonal residents or for short-term rentals. Under Michigan law, the taxes rates for these seasonal or short-term rentals are the same as those for permanent residences. Homestead credits are available to Michigan residents for one owner occupied residence, however taxpayers generally apply the credit to the residence with the highest value, making calculation of the difference in tax revenues received imprecise. Local government officials report that taxes on seasonal residences and short-term rentals do not provide sufficient revenues to support visitors' more intensive use of public services like EMS.

³⁶ Most of the hotel rooms and short-term rentals serving the visitor economy are in Houghton County and provide no tax support for the services that visitors use as they recreate in Keweenaw County.

³⁷ The Township Supervisor serving at the time of the interview also managed environmental services at Michigan Technological University and had access to the records required to make this comparison. No attempt was made to independently verify this report.

Sometimes this lack of resources leads to unfortunate results. Several interviewees told tragic, but true, stories of residents who died waiting for first responders who were busy addressing emergency needs of visitors.³⁸

Another mentioned how a volunteer first responder died on the rugged hike to the remote site where a visitor had an accident. While not arguing that local lives are more valuable, it is understandable that residents whose taxes pay for the services are concerned when they are not available to meet critical needs.

Others cited how an aging population is leading to a declining number of potential volunteers, the high burnout rate among overburdened existing volunteers or how increased training requirements make it difficult for new volunteers to qualify for first-responder roles. This change is likely to drive increases in the costs of maintaining the needed level of services and further exacerbates the problem of a lack of sufficient financial resources to pay for the additional demand created by visitors.

The burnout and broken revenue model also directly affect services required for some visitor (and local) uses of the land. For example, Keweenaw Peninsula snowmobile trails are longer with fewer access points than most other snowmobile trails in the state; an attribute which makes them an attractive destination for many riders. A single run with a trail groomer can take 12 to 14 hours to go from one access/crew transfer point to the next, making use of unpaid volunteer drivers impractical. However, while the State of Michigan's current system for supporting trail grooming pays for the necessary equipment, the program requires local volunteers to operate that equipment and provides no financial support to pay drivers. As a result, by 2022 the local cooperating entity in Keweenaw County, the Keweenaw Snowmobile Club had amassed a \$90,000 cumulative deficit and faced a solvency crisis which, if unresolved, could curtail trail grooming with devastating effects on the local economy.

There was some optimism among interviewees that the consolidation of most of the Keweenaw Heartlands under a common local management structure might provide an opportunity to charge modest user fees to support public services and the development of visitor amenities. Survey respondents overwhelmingly supported this concept as well, with 89.9% either supporting (66.3%) or potentially supporting (23.6%) a user fee. Potential supporters were concerned about the amount and how the fee would be used or did not want to see a fee for local taxpayers who are already bearing most of the cost of serving visitors.

Clearly, increasing, not just maintaining government revenues must be a management principle for the Keweenaw Heartlands.

³⁸ The reverse is also likely true as well (insufficient EMS resources to respond to visitors on a timely basis when residents are being served) but it did not surface in interview or survey comments.

IV. Principles and Values for Governance

Governance is the process and structure - the who, what, when and where - by which the Management Principles and Values - the why and how - are implemented. The American social contract for governance is elegantly summarized by the words of Thomas Jefferson³⁹ in the Declaration of Independence: "...Governments... deriv[e] their just powers from the consent of the governed." Ultimately, for a governance system to last for generations, even centuries, the people it governs must trust that it will make decisions that reflect their shared values over the long term.

The process for developing these Principles and Values for Governance is founded upon Jefferson's principle. In this case, those who are governed and whose views drove the creation of these principles and values include, primarily, those who live in or gain their livelihoods from the Keweenaw

Heartlands. In addition, the views of those who depend on the Heartlands for other purposes, like recreation and restoration or amenities that draw people to live and work in the broader area, were considered.

An extensive public involvement process provided the basis for creating the principles and values and views of the Keweenaw community. Information from that process was used to forge this Blueprint by an 18-member Planning Committee⁴⁰ broadly representative of the various groups of stakeholders whose lives and livelihoods are dependent on these lands. In addition, the natural environment, history and culture of the Keweenaw Heartlands were represented in formulating these principles and values, through proxies like The Nature Conservancy (TNC), the Michigan Department of Natural Resources and members of the planning committee representing organizations that focus on environmental and cultural stewardship.

An example of how the views of those living and working in the area (Keweenaw and Houghton County respondents) were considered is reflected in Table 5, below. This table, drawn from survey responses by local⁴¹ residents, ranks the importance of various operating characteristics for the organization that ultimately governs the Keweenaw Heartlands. These views are factored into the various subsections that follow.

The same public involvement process that supported the development of the Management Principles and Values in Section 3, also drove the creation of these Governance Principles and Values. Key stakeholder interviews, public meetings and the survey process were used to gain input which was then reviewed by the Planning Committee comprised of a cross-section of local government officials and stakeholder groups. In addition, TNC commissioned research into governance structures currently in place in Michigan, as well as exemplary structures used elsewhere across the U.S. and options for developing a customized governance structure.⁴²



³⁹ Drawing on a pamphlet published by James Wilson in Philadelphia in 1774 that stated: "...all lawful government is founded on the consent of those who are subject to it."

⁴⁰ See Appendix II for the names and affiliations of Planning Committee members.

⁴¹ All references in this section to local survey respondents refer to those claiming residence in Keweenaw and Houghton Counties.

⁴² See Appendix III for the governance examples reviewed by the Planning Committee.

TABLE 5: LOCAL RESPONDENTS' RANKING OF IMPORTANCE OF VARIOUS OPERATING CHARACTERISTICS FOR PUBLIC TRUST OF THE ORGANIZATION THAT ULTIMATELY GOVERNS THE KEWEENAW HEARTLANDS

Characteristic	n=?	Weighted Average*
Transparent: Meetings open to the public; plans, minutes, and financial reports available for public review, etc.	322	3.70
Accountable: Free of conflicts of interest; makes purchases and awards contracts based on a competitive process; uses a competitive, open hiring process, etc.	320	3.53
Professional: Managed by highly competent, experienced professionals	319	3.26
Local: Managed by people with strong ties to the area who are respected and well-known in the community.	321	3.23
Expert Management: Most knowledge and expertise for its important professional and technical work is present within the organization's staff (forest management, trail maintenance, etc.)	321	3.23
Collaborative Management: Utilizes outside resources to provide expertise and guidance and help with important professional and technical work.	320	2.98
Backoffice Expertise: Manages accounting, HR and other functions itself rather than contracting for them.	316	2.53
*4-point scale: 4 = Very Important, 3 = Important, 2= Somewhat important, 1 = Not important at all		

These governance examples were presented to the Planning Committee which then examined the desirable and undesirable features of each, noting elements that would work under current Michigan laws or would require changes in statutes, ultimately creating the list of desired features found at the end of this section.

Overall, this section is divided into three parts:

1. Context and Existing Options
2. Principles and Values for Trusted Governance
3. Desired Features and Characteristics for a Governing Body

1. CONTEXT AND EXISTING OPTIONS

Forming or finding a capable organization which could be trusted to honor the principles and values for management and to balance the interests of all stakeholders over time, was an issue that emerged in nearly every interview. In addition, when responding to open-ended questions about governance, interviewees were more likely to provide examples of why existing organizations would not be suitable than to point to an organization that was ready to take up governance or could be made ready with some tweaking.

Of 58 interviewees, 46 (79.3%) said, often emphatically, that there was no existing organization that they knew of which they would trust to own and govern the Keweenaw Heartlands. A few interviewees mentioned organizations that they felt could be modified or adapted to serve, but no organization was mentioned by more

Governance vs. Ownership
As discussed in this document, governance and ownership are potentially separate issues. In several of the models examined, the land is owned by one entity, but the power to make decisions about how the land is managed and used rests in another group. For instance, a Municipal Forest is owned by the unit of government forming it, usually a city or county. However, decisions concerning how a Municipal Forest is managed and used are made by an appointed Commission, rather than by the unit of government that owns it.

than three interviewees, and every organization named as a possibility was offered as an example of an organization that would not be trusted by other interviewees.

The organization most often mentioned by interviewees as an example that might be drawn from in designing a governing body for the Keweenaw Heartlands was the Keweenaw Outdoor Recreation Coalition (KORC).⁴³ Thirty-four interviewees used KORC as an example that could be built upon in developing a governance structure. Those holding up KORC universally cited the inclusion of all stakeholder groups as being a major value they would like to see in the ultimate governing body.

However, everyone suggesting a KORC-like organization as a potential option cited one or more things that they felt would have to be addressed for it to be a suitable governing body. The four most common modifications cited were:

- A representative board - 15 mentions
- A formal structure - 14 mentions
- Independent of existing organizations⁴⁴ - 11 mentions
- A succession plan ⁴⁵- 5 mentions

Survey respondents were also asked, "Is there an existing organization that you would trust to hold and manage the land for the benefit of the people, economy and environment of the area?" Among the 279 local respondents to this question, 157 (56.3%) checked "No."

The 122 respondents checking "Yes" were asked to name the organization. No single organization except the Michigan Department of Natural Resources (38 responses) received more than 10% of the responses to the overall question. Other organizations with ten or more mentions included: Keweenaw Land Trust (25), The Nature Conservancy (16) and KORC - generally mentioned with some adaptation or change suggested - (16).

Unlike the surveys and interviews, the group and public meetings were not structured to answer specific questions such as which organizations might be entrusted with governance. Therefore, it isn't possible to draw conclusions about whether those attending the public meetings might have a preferred governing organization for the lands.

Even so, the topic came up in most meetings, generally in the form of opposition to certain groups serving in the governing role. This was especially true in the meetings with organized stakeholder groups such as the snowmobile, ATV, hunting and fishing and deer camp clubs or associations.

In every group meeting with these local clubs, members voiced strong opposition to any local conservancy serving in the governing role. Each group cited a deep-seeded lack of trust based upon their perception of broken promises that their members would retain access, made when local conservancies previously acquired lands in the area.⁴⁶ Members were generally unable to differentiate among the various conservancies operating in the area, so it was difficult to individualize their concerns to specific organizations. However, it is possible to conclude that any existing local conservancy would face an uphill climb to gain public trust if it were to assume the governing role for the Keweenaw Heartlands.

⁴³ KORC is an outdoor recreation stakeholders group convened by the Keweenaw Community Forest Corporation (KCFC), a 501(c)(3) nonprofit operating in the area which has been involved in conserving several local properties.

⁴⁴ Probing further on this point, these 11 interviewees mentioned that it would not be desirable for the governing body to be a subsidiary of KCFC or a similar organization.

⁴⁵ Replies to probes about this response focused on the perception that KCFC was largely the brainchild of one person, raising concerns about organizational stability when that individual no longer serves in a leadership role.

⁴⁶ The perceived disconnect between stakeholder groups understanding of promises regarding continued access and subsequent access decisions made by conservancies reinforces the importance of transparency in decision-making discussed later in this section.

The interview and survey processes also tried to differentiate among various types of organizations that might be entrusted with governance (nonprofit, unit of government, etc.). However, survey and interview results showed no clearly favored type of organization.

Among interviewees, 39 of 58 (67.2%) clearly favored no specific type of organization. Another 11 (19.0%) favored a nonprofit organization, five (8.6%) favored State government (generally the MDNR), and three (5.2%) favored a special purpose unit of government formed for this purpose.

Conversely, 14 (24.1%) volunteered the opinion that the land should not be governed by Keweenaw County or one of its townships. In probing the reason behind this opinion, nearly all those offering this response cited the example of the County being unable to operate the Keweenaw Mountain Lodge (KML) profitably, and its subsequent sale to a private business, as evidence that the County (and townships) were unlikely to have the capacity to successfully govern the Keweenaw Heartlands. Notably, two currently serving local government officials cited the KML example as evidence that an existing local unit of government should not own and manage the land.⁴⁷

Local respondents to the survey also had no clearly favored type of organization. The survey asked respondents to rank order how much they trusted six different types of organizations to manage the Keweenaw Heartlands. Three types received nearly identical weighted rankings ranging from 3.93 to 4.07 on a six-point scale. They included in rank order:

- A special purpose unit of government,
- A department of state government and
- A nongovernmental organization (NGO) with a stakeholder board.

Existing local units of government ranked slightly lower at 3.23, followed by an NGO with a member-elected board at 3.12 and an NGO with an independent board at 2.54).

In summary, at the time of the stakeholder input process, no existing organization was sufficiently trusted by local stakeholders, as is, to take on governance of the Keweenaw Heartlands. In addition, no specific type of organization was favored by stakeholders.⁴⁸ Generally, stakeholders were much more concerned about the principles and values that would guide and constrain the governing structure, and about the governing body possessing the financial resources and professional expertise to successfully operate, than they were with the specific organization or type of organization that would serve in that role.

Trust in Local Government

It would be erroneous to conclude that stakeholder concerns expressed about local government ownership of the Heartlands reflect an overall lack of trust in local government. Instead, discussions relating to local government ownership focused on the capacity of local government to take on a complex new set of responsibilities given the scarcity of available financial and human resources. The small population and limited tax capacity of the area are barely adequate to support essential public services for residents and tourists. Without significant additional resources, local units of government would be severely strained if asked to support professional management of the Keweenaw Heartlands.

⁴⁷ Interviewee comments focused on whether local units of government possessed the expertise and knowledge required. It may be possible to mitigate this concern if sufficient resources were available to hire or engage professional assistance.

⁴⁸ It is unlikely that stakeholders interviewed or surveyed understood the full range of options available in Michigan, especially the various types of special purpose units of government, so it is unlikely that stakeholder opinions would have favored one these options.

2. PRINCIPLES AND VALUES FOR TRUSTED GOVERNANCE

Both the interview protocol and survey design for the public engagement process were specifically designed to gain input on the principles and values required for stakeholders to trust the governance structure for the Keweenaw Heartlands. Governance principles and values were also deeply explored by the Planning Committee, with more than a full day of face-to-face meeting time devoted to this and related topics, as well as additional time spent on review of reports and drafts and on completion of homework assignments between meetings.⁴⁹

Stakeholder input on governance from the surveys, interviews and planning committee process falls into five broad categories which will be explored below:

- a. Diverse, Representative Membership
- b. Balance Term and Tenure in Office
- c. Commitment to Principles-Based Management
- d. Public Accountability
- e. Organizational Competence

Analysis of the stakeholder input regarding principles and values for governance showed remarkable consistency across various stakeholder groups, including interviews, surveys and the Planning Committee process. Stakeholder interview responses were nearly identical to responses from local survey respondents and were largely consistent with Planning Committee input. However, Planning Committee input provided a deeper and more nuanced understanding of related issues than the interviews and surveys.⁵⁰

a. Diverse, Representative Governing Structure

In the interview process, key stakeholders were asked:

“Now, let’s think about the organization or organizations that will own and manage most of the land for the benefit of the area. What characteristics do you think are important for that organization?”

Diverse, representative membership on the governing body was mentioned by 45 of 58 interviewees (77.6%). On average interviewees who specified a group that should be represented on the governing body named 4.33 specific groups or constituencies that they felt should be given voice in the governance process. The types of groups or constituencies mentioned included:⁵¹

⁴⁹ The group and public meeting process was not designed to solicit input on this issue and produced little usable input about governance.

⁵⁰ While this section primarily focuses on the input of local stakeholders (from Keweenaw and Houghton Counties), the survey reached a much broader audience and the overall responses were remarkably consistent with responses limited to local respondents, suggesting a degree of universality in the characteristics leading to trusted governance.

⁵¹ Some interviewees mentioned multiple groups in one of these categories, such as the snowmobile, ATV and hunting and fishing clubs as user groups to be represented.

GOVERNANCE PRINCIPLES

a. Diverse, Representative Governing Structure, including:

1. User groups
2. Local government and KBIC
3. Business/tourism/economic development
4. Conservation/preservation

b. Balance Term and Tenure of Office:

1. Term lengths ensure stability
2. Limits on consecutive terms
3. Attendance requirements

c. Principles-Based Management:

1. Adhere to Principles/Values
2. Data-based planning
3. Equitable decision-making/conflict resolution

d. Public Accountability:

1. External guardrails/safety nets
2. Ethical decision making
3. Transparency/information sharing
4. Inclusive strategic and operational planning

e. Organizational Competence:

1. Professional management
2. Board capacity building
3. Sustainable revenue model

- User groups - 30/45
- Local units of government - 20/45
- Business/tourism/economic development - 19/45
- Conservation/preservation groups - 9/45
- At large - 6/45
- Other groups or perspectives - 7/45
- Private landowners - 1/45
- Diverse but unspecified - 10/45

As part of their response, several interviewees mentioned the possibility that specific user groups be permitted to appoint their own representatives to the governing body, versus having some third party do so. This opinion was offered most frequently by interviewees from highly organized user groups that had some kind of formal membership structure.

Survey questions on this topic were informed by the interview process. Survey respondents were asked to rate the importance of representation of specific groups in the governing structure. Table 6, below, shows the results of that rating.

TABLE 6: LOCAL RESPONDENTS PERCEIVED IMPORTANCE OF REPRESENTATION OF SPECIFIC GROUPS

Group	n=?	Weighted Average*
The county and townships where the land is located.	322	3.38
Major User Groups like snowmobile, ATV, mountain bike, hunting and fishing, skiing clubs and quiet user groups like hiking, birders, etc.	322	3.12
Local groups concerned with preservation of the environment, history or cultural heritage of the area.	323	3.10
Institutions and governmental departments that can provide expertise and other resources (MDNR, MTU, National Park Service, etc.).	323	2.97
Business, tourism and economic development interests.	321	2.40
At-large members who do not represent specific interest groups or organizations.	319	2.26
*4-point scale, 4 = Very Important, 3 = Important, 2= Somewhat important, 1 = Not Important at All		

Clearly, there is strong agreement among both interviewed and surveyed stakeholders that local units of government, user groups and conservation/preservation groups should be represented in the ultimate governance structure for the Keweenaw Heartlands. There was less agreement about business representation, tourism and economic development representation and at-large representation. Some stakeholders also emphasized that there should be a mechanism to adjust the representation structure for the governing body over time, as needs, interests and recreational uses change.

Participation in the governing structure from institutions and governmental departments that can provide expertise and other resources was not mentioned as important by interviewees but was seen as important by survey respondents. Some interviewees specifically mentioned that expertise and resources of these institutions would be important for the governing body to tap, but that access to that expertise did not require governing body representation, and/or that these institutions did not have the same kind of direct interest in the Heartlands as those living, working or recreating in the area.

b. Balanced Term and Tenure in Office

About a quarter of the interviewees and a significant number of survey respondents raised concerns or made suggestions concerning the term and tenure in office for governing body members.⁵² The planning committee also raised this question in its discussions.

Comments in interviews and surveys fell into two distinct categories. The first and larger set of responses focused on the value of having a stable and apolitical board where membership doesn't change wholesale as a result of elections or other factors. The consequent stability would allow members to gain increased perspective and competence over time to deal with complex issues.

The second set of comments focused on the need for any board to refresh its membership to remain responsive to changing circumstances, avoid public perception that the membership is closed and unresponsive, build ongoing capacity and avoid a crisis when factors such as intergenerational change might otherwise result in a wholesale shift of membership.

Clearly, universal term limits for governing body members are not practical if a portion of the membership will represent or be appointed by the local units of government (as suggested by the strong ranking of the importance of county and township representation discussed in the previous section). However, public election and appointment processes guarantee some degree of change over time.

The representatives of other constituencies stated that a combination of policies that are considered best-practices in organizational governance could suffice to address these concerns. Some of the best-practices widely discussed in governance publications include:

- Terms that are long enough to reduce turnover – typically three or more years.
- Limits on the number of consecutive terms – typically two to three, not exceeding six to ten years, including any partial terms.
- Attendance policies that treat a member's excessive absences from meetings as their resignation from the board – typically missing more than one-third to one-half of the regularly scheduled meetings.

c. Commitment to principles-based management

Half (29/58) of the interviewees mentioned a commitment to principles-based management as an important principle for the operation of the Keweenaw Heartlands' governing body.⁵³ This was also a repeated theme in the discussions and group exercises of the Planning Committee. This concern further breaks down into three persistent themes:

1. Follow the established Management and Governance Principles and Values (provided in Sections 3 and 4 of this Blueprint).
2. Act based on established data-based plans.
3. Utilize an equitable decision-making process, including a mechanism for addressing user conflicts.

Each of these themes is discussed briefly below.

⁵² In response to an open-ended question regarding other desired characteristics for the governing body.

⁵³ In response to an open-ended question without this response suggested by the question or the probes used in the interview protocol.

1) Follow the established Management and Governance Principles and Values

A question asked by a participant in one of the public meetings summarizes the concerns that emerged in the interviews and Planning Committee meeting, and demonstrates that this concern is on the minds of the public as well:

“How can we be sure that the lands will be managed according to the plan you are developing?”

This question gets at the core theme of the discussion in the planning committee and the concern expressed by the interviewees. Discussion in the Planning Committee and with interviewees suggests that the most likely way this could be achieved would be embedding a requirement to this effect in the governing documents or enabling legislation for the governing body.

2) Act based on established data-based plans.

Interviewees, Planning Committee members and a few participants in public meetings expressed concern that sufficient research and planning had not been conducted to inform decision making and/or that they were concerned that decision makers follow a data-based plan.

As discussed in the Management Principles and Values section, the environmental, cultural and historical assets of the Keweenaw Heartlands have never previously been systematically and comprehensively inventoried. The Nature Conservancy has commissioned an initial inventory of these assets which will be a tremendous aide to management planning and decision making, and it will serve as a fundamental guide to known areas where special care must be taken in management decision making.

However, the large size of the land and absence of previous detailed inventories means that this initial inventory should not be viewed as exhaustive, and should be supplemented, over time, with more detailed investigations. In addition, stakeholders expressed concerns that safeguards be put into place for projects that would develop or alter the land to ensure that undiscovered environmental, cultural or historical assets are not compromised.

Two recommendations have emerged from this process to address this lack of a detailed inventory of assets, and the concern that the ongoing governance of the Heartlands follow data-based plans:

- a. Incorporate provisions in the governing documents or enabling legislation specifically requiring the governing body to develop and follow this Blueprint and a data-based plan in managing the land.
- b. Develop and implement policies and procedures to ensure that an environmental, cultural and historical site assessment is completed before any activity is permitted that would physically alter the land.

3) Utilize an equitable decision-making process, including a mechanism for addressing stakeholder conflicts.

Interviewees, especially those not associated with major user groups, expressed strong concerns about the possibility that the governance structure or process could become dominated by some stakeholder groups at the expense of others. Similarly, some interviewees and participants in meetings with major user groups expressed concern that conservation groups or others could dominate in the decision-making process and foreclose access to existing trail networks or disallow uses commonly permitted on lands enrolled under Michigan’s Commercial Forest Act, such as hunting and fishing. Other interviewees and participants expressed concerns about business and tourism interests dominating and favoring development that would change the character of the area and degrade the quality of life for residents.

Other interviewees raised similar concerns as they asked that the governing body use a consensus-based approach to minimize the possibility of irreconcilable conflicts developing among stakeholder groups. However, recognizing the risk of paralysis when consensus cannot be reached, the Planning Committee recommended that the governing procedures and policies include a path to decision making for issues that cannot be resolved by consensus.

While some of the specifically expressed concerns, such as maintaining access to existing MDNR-permitted trails, could be addressed in enabling legislation or governing documents, areas of potential conflict cannot always be predicted or addressed in advance. Clearly, what various groups of stakeholders were requesting is some form of equitable and defined resolution process when a conflict among users emerges. Some form of built-in mediation process would likely be a desirable feature for the governing body and was specifically suggested by some stakeholders.

d. Public Accountability

The principle of public accountability was raised in nearly all the interviews (53/58). It was the second most highly ranked operating characteristic, for importance, in surveys (3.53 on a 4.0-point scale) and was raised in various ways in most public meetings. Stakeholders viewed several aspects of public accountability as important including:

1. External guardrails/safety nets.
2. Adherence to established management principles.
3. Ethical decision-making processes.
4. Transparency and information sharing.
5. Inclusive strategic and operational planning.

Each of these aspects of accountability is discussed in more detail below.

1) External guardrails/safety nets

For interviewees, the accountability feature most often mentioned as desired was generally described as either “external guardrails” or “a safety net.” In probing the meaning behind these terms both referred to external third parties retaining the power to intervene if the entity that governed the Keweenaw Heartlands strayed from the management and governance principles developed by the stakeholder input process described in this Blueprint.

The impetus for this desire described by interviewees included several patterns that they had seen emerge with other organizations and initiatives in the area. These included governmentally run initiatives changing direction with changes in elected leadership, some organizations changing direction after interest groups “packed the room” with their supporters during decision-making or board election processes and organizations’ missions drifting as board members changed over time.

In public and stakeholder group meetings, the desire for external guardrails or safety nets most often took the form of questions like, “How will you keep the governing structure from being hijacked by special interests?” or “How can we be sure the plan will be followed over time?” In interchanges around these and similar questions, public and group members expressed a strong desire to have a third-party positioned to pull the governance back on track.

The survey process was not designed to specifically measure stakeholder sentiment on this issue; however, it did arise in a few comments offered to various open-ended questions.

Interviewees, public and group meeting participants and planning committee members expressed several ideas for how guardrails or safety nets could be established. These ideas included:

- TNC and/or the MDNR retaining some form of covenant or condition related to the land transfer giving them the right to intervene, or to “claw back” the land if the Blueprint were not followed.
- If the governing body is a nonprofit organization, including safeguards in its governing documents that could not be changed without TNC or MDNR approval.

- If the governing body is a unit of government, including safeguards in the enabling legislation or governing documents which require State authorization to change.
- Including requirements in enabling legislation and/or governing documents that the governing body adhere to the Principles and Values for Management described in this Blueprint.

2) Ethical decision-making processes

Both interviewees and survey respondents expressed a strong desire to ensure that the governing body for the Keweenaw Heartlands is bound by and operates with ethical, rules-based decision-making processes. Half of the interviewees (29/58) expressed this desire in response to open-ended interview questions about characteristics required for public trust of the governing body. Accountability, specifically including ethical decision-making, was rated as important or very important by nearly all the local respondents to the survey (289/320, 90.3%). The planning committee also selected this as one of the most important features desired for the ultimate governing body.

Comments in interviews provide further explanation of this desire/concern. Several interviewees explained that, with a very small local population, Keweenaw-based organizations and units of government tend to operate very informally. Since most residents know each other, and local vendors are generally well known personally by decision-makers, the processes for important decisions like purchasing and hiring are often handled informally without competitive bidding or advertising for available positions.

While, in most cases, this informal decision-making process works well, and produces cost- and time-efficiencies, interviewees and Planning Committee members felt that it was critical that the governing body for the Keweenaw Heartlands operate on a more formal and professional basis and be required to adhere to more stringent ethics and conflict-of-interest requirements.

Interviewees and Planning Committee members also expressed strong opinions about the need for stringent adherence to a strong set of conflict-of-interest policies. Again, the small population base was cited as making it hard to conduct any transaction without someone in a decision-making role having a real or perceived conflict-of-interest. Given the number of stakeholder and other interests that the Principles and Values for Management section of this Blueprint discusses, strict adherence to conflict-of-interest guidelines and procedures, as well as transparency in the decision-making process, will likely be critical to public and stakeholder acceptance of the validity and fairness of decisions.

Generally, when the nature of the desired ethical standards was probed, interviewees and Planning Committee members said that operating within the ethical framework and compliance with open meetings and records regulations required by Michigan law for units of government would meet their expectations, so long as the governing organization did not overly utilize exceptions such as accepting single source bids or hiring those brought on temporarily to permanently fill vacancies. Strict adherence to State or similarly stringent conflict-of-interest policies and procedures and open meetings and records laws was seen as an acceptable way of addressing this issue.

However, one other related area of concern came up in Planning Committee discussions. Given the strong desire of stakeholders for the governing body to incorporate members who are representative of the various stakeholder groups, Committee members were concerned that decision-makers vote on issues based on the best interests of the Keweenaw Heartlands, rather than on the best interests of the stakeholder group(s) to which they belong.

The Planning Committee discussed the Duty of Loyalty that nonprofit board members have under Michigan law, which requires them to put the interests of the organization above any other interests in deciding matters which come before the governing body.⁵⁴ They expressed the strong opinion that the Duty of Loyalty should be

⁵⁴ Michigan Statutes 450.2541(c) and associated case law.

prominently incorporated into governing documents and policies to ensure that members of the governing body remain aware of this responsibility.

3) Transparency and information sharing

There is a platitude about transparency that goes: “If you don’t tell people what is going on, they will make something up, and it is never complimentary.” Interviewees and survey respondents were clearly aware of the principle behind this platitude, and strongly expressed their desire for transparency in all the work of the Keweenaw Heartlands governing body.

Transparency, optics or information sharing was raised as a major factor required for public trust by 37 of 58 interviewees (63.8%). Similarly, it was ranked as the most important among all characteristics required to trust the governing body by local survey respondents, achieving an average rating of 3.7 on a 4.0-point scale. Only 19 of 320 respondents rating transparency gave it a ranking lower than “Important” (3.0 on the scale).

Characteristics of transparency identified in interviews and survey comments included:

- Publicized, open board and committee meetings held at accessible times and locations.
- Public availability of all plans and studies used in decision-making.
- Public availability of all board and committee meeting records.
- Public availability of all financial records, bid documents, etc.
- A robust public communications program, including periodic public meetings.
- If a public entity, bound by all State rules related to openness and accountability.

Based on the robust stakeholder and planning committee input on this issue, transparency is clearly a critical requirement for public trust in the organization governing the Keweenaw Heartlands.

4) Inclusive strategic and operational planning

Interviewees and planning committee members clearly recognized that the initial public input and planning process leading to this Blueprint is only the beginning, and that ongoing strategic and operational planning will be required. Twenty-six of the 58 interviewees (44.8%) raised this issue even though it was not included in the questions or additional prompts used in the interview protocol. This issue was raised again and rated as Important in the Planning Committee process as well.

This ongoing planning will be needed not only in the near term, as the governing body translates the principles and values in this Blueprint into operational plans, but also on an ongoing basis over the decades as various factors change over time, such as political leadership, user needs and interests or the effects of climate change on the environment and ecosystems of the Heartlands.

Two very specific sub-themes related to this ongoing planning emerged from the interviews and planning committee input. First, both the interviewees and the Planning Committee were adamant that the ongoing planning process must include an inclusive, highly participatory stakeholder engagement process, similar to the one used to create this Blueprint. Second, they called for this engagement process to be built on ongoing relationships maintained by the governing body with constituencies like Keweenaw residents and landowners, governmental officials, user and other stakeholder groups, and business and economic development leaders.

When discussing these issues, interviewees and Planning Committee members recognized that not every stakeholder group or other constituency whose expertise may be needed in the future to address issues may be interested in every aspect of ongoing planning that facilitates ongoing governance. For instance, planning related to a specific issue, like siting of workforce housing, might require involvement of some groups and not others in specific deliberations, but the recommendations should likely be circulated to all stakeholder groups for review

before being finalized to avoid the possibility of overlooking conflicts among uses, or synergies that might be possible with other plans.⁵⁵

e. Organizational Competence

Creating and sustaining competence in its governance and operations was an often-repeated theme among interviewees, with 34 of 58 (58.6%) raising this as a concern even though it was not a specific topic of any question or prompt in the survey protocol. It was also raised as a significant concern by the Planning Committee.

In discussing this concern in detail, three sub-themes emerged:

1. Professional Management
2. Board Capacity Building
3. A Sustainable Revenue Model

Each of these sub-themes is discussed in more detail below.

1) Professional Management

Professional management emerged as a strong theme in the interviews, with 34 of 58 interviewees (58.6%) raising it as a concern. As one interviewee put it, "It really doesn't matter what the structure is if the organization doesn't have competent management."⁵⁶

In addition, nearly half (49.5%) of all local survey respondents ranked Professional Management as Very Important, the highest possible ranking, and another 31.0% ranked it as Important, totaling 80.5% of all respondents highly ranking the importance of this issue. Overall, it achieved a score of 3.26 on a four-point scale. A related item, Expert Management, also rated very highly with a slightly lower average score of 3.23, but an even larger percentage ranking it as Important or Highly Important (82.5%).⁵⁷

Strong reasons for this concern emerged from further parsing interviewees' comments about this topic. Interviewees cited a tendency for local organizations to hire local people for open positions over outsiders, even if there are no local candidates with related training or experience. Others noted that factors like availability of affordable housing or spousal employment, distance to amenities like schools, shopping, healthcare and limited budgets sometimes make it hard for local organizations to hire from outside the area. Concerns over this issue also led directly to the inclusion of open, competitive hiring to fill all vacant positions in the previous discussion of ethical decision-making.

Beyond the chief executive officer, interviewees and survey respondents were relatively ambivalent about whether the governing organization should hire internally or contract externally. Interviewees generally indicated that it would be good if the organization could have the most important competencies on staff, but it was more important that the work be completed competently, even if that requires contracting out for it. They were also ambivalent about whether back-office functions, such as accounting, are conducted in-house or contracted.

⁵⁵ For example, trail-related user groups may not feel a desire to become involved in planning for a workforce housing project. However, their review of the proposed plan might identify modest changes enabling workers to access trails for travel to their workplaces.

⁵⁶ It was not always possible to separate when comments related to the professional management of the governing entity versus professional management of the forest resources of the area. Both were clearly on the minds of interviewees and survey respondents, so the related elements are discussed in both the Management and Governance Principles and Values sections of this Blueprint.

⁵⁷ Survey questions about Professional Management and Expert Management appear to have been confusing for respondents. Professional Management was intended to measure respondents' desire that the organization's CEO/leadership team are highly competent, experienced professionals." Expert Management was intended to measure whether respondents felt it is important for technical expertise like forestry or species conservation to be present on staff versus contracted out to third parties. It is clear from comments and feedback that the difference between these characteristics was not well explained to or understood by many respondents.

Local survey respondents were equally ambivalent on this issue, slightly favoring in-house expert management over collaboration with outside organizations to acquire needed expertise. They also did not express a strong preference for in-house versus contracted back-office support and expertise.

2) Board Capacity Building

Both interviewees and planning committee members expressed a strong desire to see a regular and robust program of capacity building for the board that governs the Keweenaw Heartlands. Interviewees pointed to the small population of the area and how, unlike a larger community or metropolitan area with a deeper talent pool, leadership positions often must be filled with people without formal training or professional experience in administrative or leadership roles. These comments spoke to the importance of familiarity of prospective board members with Roberts Rules of Order, the tenets of effective organizational governance, best-practices of well-run organizations and the duties and responsibilities of board members under Michigan law. It was emphasized that familiarity or experience with these important elements of well-run organizations cannot be assumed.

Planning Committee members were especially concerned about the capacity of the governing board to balance the many stakeholder interests discussed elsewhere in this Blueprint. As one wrote in critiquing a draft of this Blueprint, "We should include effectiveness and efficient governance principles. If this structure doesn't operate effectively and efficiently and gets bogged down in infighting, micromanagement, politics, etc., then it's difficult to make progress and move forward." To ensure that the governing body for the Keweenaw Heartlands operates effectively and develops and retains the capacity to meet the various legal and ethical standards, interviewees and Planning Committee members believe that an ongoing, robust board capacity building program is essential.

3) A Sustainable Revenue Model

Strong concern about ensuring there is a sustainable revenue model to support governance and management of the Keweenaw Heartlands was expressed in every form of public input and participation for this Blueprint. As one survey respondent commented, "If there is no thought about the financial needs 10, 20, 50, years from now, then the plan is not well thought out." Or, as a Planning Committee member wrote, "We want each of the [ultimate] owners. to be sustainable, and we want this governance and management structure that we are developing to be sustainable. [The Blueprint should] provide a section that emphasizes the concept of establishing a structure that lasts beyond generations, changes in use interests, etc."

In nearly every public and group meeting, participants also raised this topic. Generally, it came in the form of questions like, "How are you going to pay for it [managing the lands]?" and questions about how the tax revenues that local units of government rely upon would be replaced under the new governing structure, especially if it were a tax-exempt nonprofit or governmental organization.

In Planning Committee sessions, as members participated in a detailed review of governance examples currently in place in Michigan, much of members' focus was on the revenue sources available to each type of organization. In rating critical and desirable revenue-related features for the ultimate governing organization, the following priorities were identified (in approximate order of importance).

Authority/eligibility to:

- Receive grants through the Michigan Natural Resources Trust Fund.
- Generate revenues from sales of timber and other forest products as well as carbon offsets.
- Establish user, parking, camping and similar fees.
- Accept gifts and bequests.
- Enter into leasing and concessionaire agreements.

- Sell (to public entities) and/or lease (to private entities) a small percentage (e.g., 5-10%) of the land for public purposes, such as public infrastructure, workforce housing, economic development and visitor services.
- Issue revenue bonds.
- Issue fines for violations of rules and regulations
- Impose and collect hotel and short-term rental taxes or fees.
- Enact voter-approved tax levies.

3. DESIRED STRUCTURE AND CHARACTERISTICS FOR A GOVERNING BODY

The Planning Committee was presented with research conducted by TNC concerning types of governing structures enabled by current Michigan law and exemplary structures from other states, including options for developing a customized structure for this project. Planning committee deliberations concluded that no single existing governance structure has all the highly desired features for the Keweenaw Heartlands, but some might be adapted to include most or all the features.

While the flexibility that allows a nonprofit governing structure to be designed to exactly match the desired characteristics was appealing, committee members recognized that some critical streams of funding in Michigan are available only to governmental entities. Chief among these is access to grants from the Michigan Natural Resources Trust Fund.

The committee members reviewed every example presented, and offered their insights about which features were desirable and undesirable in each. Once this process was completed, committee members ranked features' importance across the various examples, resulting in a clear differentiation between critical and desirable features. As a result of these deliberations, committee members charged TNC staff with exploring which of the various Michigan governing structures might be successfully adapted to meet the critical and desirable criteria for the governing body that emerged from the public engagement and Blueprint planning processes.

Based on this process, the committee asked TNC to return with recommendations about which example(s) could best be adapted to meet these criteria, or, if it is infeasible, to return with recommendations for and assistance with formation of a new kind of governmental entity to assume governance of the Keweenaw Heartlands. This recommendation, as adapted by the planning committee, is presented in the next section of this Blueprint.

The balance of this section is focused on the critical and other desirable features for the governing body for Keweenaw Heartlands. The rationale and data supporting these criteria have been discussed in detail in various sections of this Blueprint.

1) Critical features for the governing organization

a. Structure and Membership

- i. Representation of major stakeholder groups, preferably on the governing board, or, if that is not possible, on an advisory council or other body whose advice is required to be considered by the governing board in its decision-making. The board should consist of at least seven to ten members and represented stakeholders should include:
 - Users – specifically including representation of various major uses.
 - Local units of government, including the Keweenaw Bay Indian Community.
 - Residents and property owners.
 - Environmental, historical and cultural preservation.
 - Business, tourism and economic development.

- ii. Multijurisdictional and independent from budgeting and decision-making authority of other units of government. For example, Board members of certain authorities and commissions operating under Michigan law, have full authority for budgets and decision-making, independent of any other unit of government that may hold title to the related assets or have the power appoint their members.
 - iii. Both recreation and natural resources management specifically stated as purposes in the enabling legislation.
- b. Public Accountability
- i. Subject to open meeting and open records requirements generally applicable to Michigan units of government.
 - ii. Subject to the ethics and conflict of interest requirements generally applicable to Michigan units of government.
 - iii. Governing board members subject to a Duty of Loyalty comparable to that required under Michigan law for board members of nonprofit organizations.
 - iv. Subject to environmental, historical and cultural review and preservation requirements⁵⁸ for all activities which would physically modify the land.
 - v. Subject to the public access requirements of Michigan’s Commercial Forest Act.
 - vi. Subject to a requirement that actions be taken in accordance with the principles and values expressed in this Blueprint and the provisions of adopted management and operations plans.
 - vii. Subject to a requirement that management and operations plans be developed with robust public and stakeholder input processes.
- c. Finance and Operations
- i. Eligible for grants through the Michigan Natural Resources Trust Fund.
 - ii. Permitted to accept other grants and contributions.
 - iii. Permitted to generate revenues through commercial forestry activities, leases or permits for cultivation or harvest of non-timber forest products, sale of carbon offsets, etc.
 - iv. Permitted to generate revenues through user fees, parking charges, etc.
 - v. Authority to Issue revenue bonds (e.g., for development of amenities such as visitor parking, campgrounds, etc.).
 - vi. Authority to enter into leasing and concessionaire agreements.
 - vii. Permitted to purchase, own and accept gifts of land.
 - viii. Authority to transfer land to other public entities for public purposes, or to lease land to private entities for periods not exceeding 40 years⁵⁹ to achieve goals established in an economic development plan adopted by a public entity; provided this authority to transfer or lease land shall be subject to any legal restrictions that apply to the land, including without limitation grant funding or legislative restrictions. Further, (a) prior to the transfer or leasing of land, the impact of the transfer or lease on the land’s environmental, ecological, historical, scenic, and cultural

⁵⁸ To include providing opportunity to review and comment to the Keweenaw Bay Indian Community (and/or other appropriate unit(s) of Tribal Government) for all projects involving cultural sites.

⁵⁹ Equal to the 39-year straight-line depreciation period for commercial and residential building assets allowable under the Internal Revenue Code, plus one year to accommodate construction.

values, as well as public access and use, must be evaluated; (b) any transfer or leasing of land, and the resulting permitted uses of the land, must be consistent with and not adversely impact that land's identified environmental, ecological, historical, scenic, and cultural values, and (c) in no event may the total amount of land transferred or leased exceed 3% of the land owned by the governing entity at any given time,⁶⁰.

- ix. Required to make payments in lieu of taxes (PILT) to counties, townships and school districts where it owns land, in amounts at least equal to taxes that would be imposed on privately held lands enrolled under the Commercial Forest Act.
- d. Governmental Powers
 - i. Authority to impose and enforce, or to enter into contracts to enforce, regulations governing access to and use of the land and to establish and collect fines for their violation.
 - ii. Authority to provide, or enter into contracts to provide, public safety services.

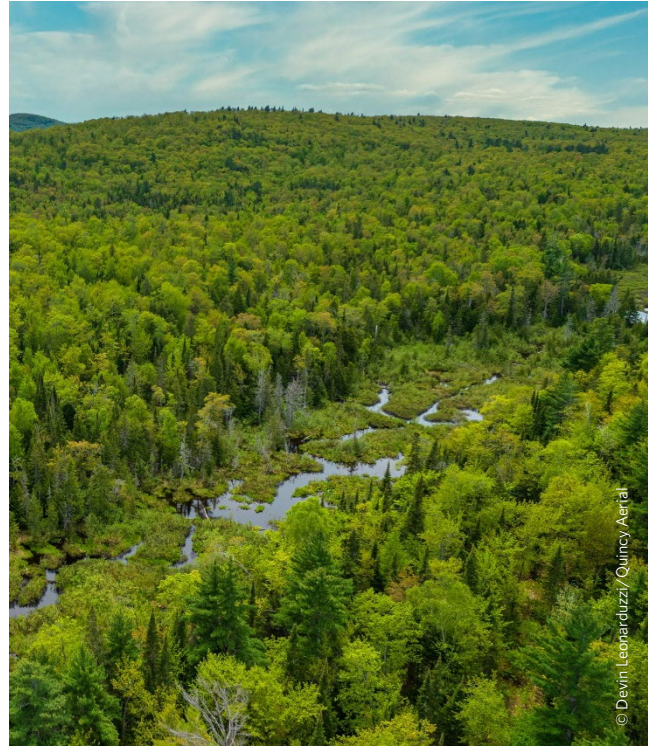
2) Other desirable features for the governing organization

- a. Requirement that the MDNR and the Keweenaw Heartlands governing body consult with each other in developing plans and policies for the use and management of their respective lands on the Keweenaw Peninsula, specifically including, but not limited to, coordination of recreational trail networks thereon and other activities that span the lands of both entities.
- b. Requirement for mediation of disputes when called for by one or more stakeholder groups represented on the governing body, with the governing board retaining authority for final decision-making if an acceptable mediated resolution is not achieved.
- c. Authority to include or expand governmental representation on its governing body to include nearby areas that are economically interdependent.
- d. Authority to coordinate timber management and harvest activities and contracts with MDNR and other public or private entities.
- e. Authority to enact voter-approved mill levies.
- f. Authority to impose and collect hotel and short-term rental taxes or fees from areas that benefit from Keweenaw Heartlands tourism.
- g. Authority to coordinate enforcement of regulations, with MDNR and other public or private entities.

⁶⁰ Lands leased to a private party at the time of the governing organization's acquisition are not included in this calculation during the term of that lease. Upon the expiration of that lease, the lands will be included in this calculation.

V. Recommended Governance Structure

At the second Planning Committee meeting in January 2023, Committee members asked staff of The Nature Conservancy to research and recommend governance structure options that could, as much as possible, meet the Principles and Values for Governance detailed in the preceding section of this Blueprint for the lands that do not transfer to MDNR. Committee members and TNC discussed the relative merits of a special unit of government vs a non-governmental organization and there was general consensus that a special unit of government seemed to offer some advantages over creating an NGO. Also discussed was the probability that some principles could be met through State enabling legislation for the type of structure adopted, some could be incorporated in the founding documents that create the governing entity and some might require legislative action, either by creating a new type of special purpose unit of government under Michigan law, or by adding provisions to Michigan statutes governing an existing special purpose unit of government.



Between January and the final meeting of the Planning Committee in June 2023, TNC staff and its legal counsel reviewed the adopted principles and values, compared them to existing governing structures and developed a set of recommendations for Committee review. In June, the Planning Committee reviewed TNC's recommendations, provided feedback and suggested revisions that were incorporated into the final recommendations. The Committee also helped TNC identify a preferred process to determine the final form to report out to the community and take to the legislature for necessary statutory changes.

The structure, as proposed by TNC and modified with Planning Committee input, would have the following features:

Governing Entity

- Governing Entity (Entity) created as a Commission or Authority by one or more local units of government located in and inclusive of Keweenaw County.
- Five-member Trustee Board (Board).
- Districts for Board members correspond to districts for County Commissioners.
- Elected by voters of Keweenaw County on same ballot, with names placed on the ballot by the same process and residency requirements the same as other local elected officials.
- Staggered four-year terms.
- MDNR Director (or designated representative) serves as ex-officio, non-voting member of Board.
- Land and related assets owned by Entity.

- Deed restriction prohibits Entity from disposing of the lands or allowing use of the lands for purposes other than sustainable forestry⁶¹, public access and enjoyment, outdoor recreation and necessary maintenance of the property.
- If Entity dissolves or the land not used consistently with deed restrictions and/or for the specified purposes, land is returned to the State of Michigan until a local governmental Successor Entity (Successor) is created.
- Successor(s) subject to the same structure, requirements and restrictions as Entity.
- Budget of Entity independent of any municipality or other government entity.
- Board vested with sole responsibility for the development and approval of that budget.
- Entity required to adopt, make available for public review and input and follow a management plan, consistent with the principles in this Blueprint, in determining use, development and management of the land and current or subsequent facilities on the land.
- All management decisions are the responsibility of the Board unless delegated to staff employed by the Board.
- In addition to the elected Trustee's and the MDNR Director, up to three members of the Stakeholder Advisory Committee be members of the Board. The advisory committee will recommend a slate of representatives that the Trustee's will affirm.
- The Board of Trustees will have a participation requirement for all members and a process for removal and replacement of members who fail to meet the participation requirement.

Stakeholder Advisory Committee

- Entity required to create a Stakeholder Advisory Committee (Stakeholder Committee), consisting of at least five members, including members representing, at a minimum, the following interests:
 - Environmental Stewardship,
 - Cultural and Historic Stewardship and Interpretation,
 - Forestry and Commercial Use,
 - Recreational Uses,
 - Infrastructure Management and Public Safety.
- Governing documents require the Entity to consult with the Stakeholder Committee in developing plans guiding decision-making about proposed uses of the land. Additionally, the Stakeholder Committee may nominate up to three (3) members annually to serve on the Board of Trustee's.
- Individuals interested in appointment to Stakeholder Committee apply to Board using a standard application developed by the Board.
- Board appoints Stakeholder Committee members.
- The Board determines the number of members of the Stakeholder Committee and the desired expertise.
- Stakeholder Committee Members do not have to be Keweenaw County Residents.
- Stakeholder Committee size, minimum meeting frequency and term of service length determined by Board of Trustees.
- Stakeholder Committee may form subcommittees of topical experts and others interested in specific topics, issues and land uses.

⁶¹ Including non-timber forest products harvested in a manner consistent with sustainable forest management practices.

- Subcommittee members may include individuals who are not members of the Stakeholder Committee.

Government Relations Advisory Committee

- Entity required to establish a local Government Relations Advisory Committee (Governments Committee).
- Governing documents require the Entity to consult with the Governments Committee in developing plans guiding decision-making about proposed uses, development and management of the land and related infrastructure and facilities.
- One member of Governments Committee appointed by each of the following:
 - Keweenaw County Board of Commissioners,
 - Grant, Eagle Harbor, Houghton, Sherman and Allouez Townships,
 - Keweenaw County Sherriff,
 - Keweenaw County Road Commission,
 - Michigan Department of Natural Resources (Local Manager).
- Respective units of government determine their designated representative to the Governments Committee.
- Appointment of a member to the Governments Committee is permissive and not mandatory for units of government.

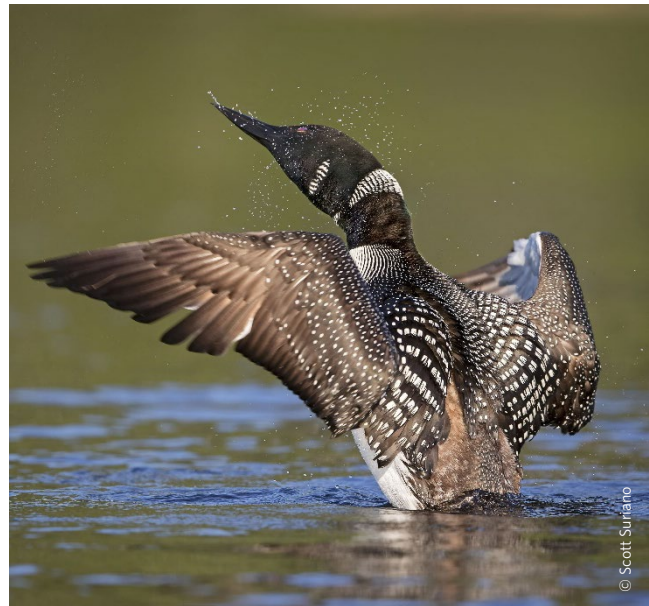
Keweenaw Bay Indian Community (KBIC)

- Board consults with KBIC and mutually determine if KBIC wishes to participate in Government Relations Advisory Committee, consult directly with Governing Entity board or both.
- At its discretion, KBIC may appoint a member to the Stakeholder Committee and/or any subcommittees thereof

There is currently no State authorizing statute which directly aligns with the recommended structure. The two that most closely align are the Municipal Forest Act and the Recreational Authorities Act. The Planning Committee charged TNC with working with local units of government and other stakeholders to facilitate creation of the desired local entity. Most members of the Planning Committee volunteered to remain engaged in an ad hoc advisory and support role to help TNC through this process, which is anticipated to extend into 2024.

VI. Ongoing and Future Work

With the publication of this Blueprint, the initial phase of engagement with and gathering feedback from the residents, visitors and businesses interested in the future of the Keweenaw Heartlands comes to a close. The Blueprint represents the summary of the values and desired outcomes the authors heard from a wide range of interests and synthesizes that input into actionable recommendations for community leaders to consider and implement. However, to quote Winston Churchill's famous words from 1942, "...this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning." Successfully implementing this Blueprint and managing the Heartlands for the benefit of the people, economy, environment and culture of the region will require ongoing hard work and some immediate next steps.



This section memorializes some of the most important components of that work identified by the community and refined by the Blueprint Planning Committee, TNC and DNR. Some of that work has already been initiated but much has yet to be started. While some of the work is directly related to successfully transitioning the Heartlands itself to local ownership, governance and management, there are discrete topical bodies of work (e.g., infrastructure, affordable workforce and family housing, public safety, economic and business transition and development, community leadership capacity) that while not directly part of the Heartlands project, are none the less exacerbated by the growing use of and interest in the property. If not successfully addressed, these issues can undercut long term public support and the ability to care for the Heartlands. Some elements of this work may be required or advisable prerequisites for other elements. For instance, ongoing community engagement will be essential for creating a long-term governance structure that is trusted by the people of The Keweenaw.

Finally, rural communities across the US, where many of our most treasured natural landscapes are located, have struggled for decades with population loss, limited economic opportunity and the transfer of material wealth and human capital out of their communities to distant urban centers. The Heartlands creates a community asset around which the region's residents can build a sustainable future. The work to date and the next steps outlined in this chapter were generated by 18 months of resident and stakeholder engagement and are intended to be a roadmap to that future.

The Heartlands project has three distinct, overlapping phases:

- 1. Phase One: Acquisition, Blueprint Development and Initial Management**
 - Initiate community engagement process to develop a common vision for the property among stakeholders, based upon shared community values.
 - TNC acquires the Heartlands (complete).
 - TNC manages the Heartlands.
 - Complete this Blueprint, including its governance and management structure recommendations.
- 2. Phase Two: Transition of Governance and Management**

- Conduct an inventory of natural, cultural/historical, timber/carbon and infrastructure assets, (e.g., roads, culverts) and develop recommendations for stewardship, management and sustainable uses of the Heartlands.
 - Complete a utilization study to determine how the land is used and what portions are best suited for various activities.
 - Continue robust stakeholder engagement to further refine plans for addressing topical bodies of work, including (but not limited to):
 - Community Infrastructure
 - Land Management
 - Public Use and Access
 - Public Safety
 - Affordable Workforce and Family Housing
 - Economic and Business Transition and Development
 - Leadership Development
 - Develop a mechanism which allows a small percentage of the Heartlands to be used for non-conservation, community purposes, including but not limited to housing, public infrastructure and emergency services.
 - Determine a final plan for ownership and governance, and create local ownership, governance and management entity(s).
 - Develop a financial sustainability plan.
 - Develop a land transition strategy appropriate to the governance structure selected.
 - Begin to transition ownership, governance and management from TNC to ultimate governing entities.
- 3. Phase Three: Long-Term, Local and State Governance and Management**
- Fully transfer the land to ultimate governing entities.
 - Ongoing ownership and management by ultimate governing entities.

1. RECOMMENDED NEXT STEPS FOR SUCCESSFUL TRANSITION OF THE HEARTLANDS INTO PUBLIC OWNERSHIP

a. Inventorying the Land

Previous sections of this Blueprint emphatically call for data-informed governance, management and land-use decision-making for the Keweenaw Heartlands, and stress the importance of developing, publicizing and adhering to data-informed plans. A common point made by Blueprint interviewees was that no comprehensive inventory exists documenting the environmental, cultural, historical, and geological assets of the Heartlands, and that past mineral and forest inventories were generally focused on determining commercially valuable resource extraction opportunities.

TNC also identified the need for an initial inventory of these assets to guide their interim management, place appropriate protections on important sites before transferring lands to new owners and inform management recommendations to future public owners. This was reinforced by the input of survey respondents, public meeting participants and planning committee members. TNC commenced this inventory in spring 2023 with a goal of documenting the status of ecological, cultural, forest resources (timber and carbon), and infrastructure features.

This first step by TNC, while critically necessary, is not intended or expected to fully identify all the unique and valuable sites across more than 32,000 acres of the Heartlands. TNC and various stakeholders recognize that ongoing assessment and additional inventories may be necessary. This is because of the dynamic nature of ecological systems and their response to human management choices and a changing climate, as well as the ongoing process of discovery across the Heartlands. These efforts may focus on a subsection of the Heartlands or on a particular class of assets, set of species, type of habitat, physical feature of the land, or other sets of characteristics.

b. Community Infrastructure Assessment

Since the inception of this project, there has been a recognition that there are non-conservation community needs that might be met by using a small portion of the Heartlands acreage. It is not likely that all those needs can be quantified, and specific parcels identified before TNC transfers land to its final operating entity. TNC will develop language in the transfer documents that identifies areas within the Heartlands that could be suitable for non-conservation uses that may be required in the future. One of the most significant, allowable, non-conservation uses for small portions of the Keweenaw Heartlands will be to accommodate the development of critical public infrastructure.

Addressing infrastructure needs of the County and its communities will likely require use of at least some of the Keweenaw Heartlands' lands. For instance, local officials have reported that the only known site suitable for a new wellfield to assure Copper Harbor has an adequate future water supply is located on Keweenaw Heartlands' property.

However, experience from RES Associates' work across rural America has demonstrated that few communities are fully aware of their infrastructure needs. This is particularly true for underground infrastructure such as water, sanitary sewer and storm sewer systems, where the needs are usually "out of sight, out of mind" – until it breaks.

The need for communities to better understand and manage their water infrastructure is reinforced in Michigan by the creation, in 2013, of the SAW (Stormwater, Asset Management and Wastewater) grant program that provides communities the resources to develop water asset management plans and in 2018 the passage of Public Act 324, which created the Michigan Water Asset Management Council specifically to help communities develop asset management plans for their water infrastructure.

This lack of broader public awareness often extends to electrical distribution systems and community facilities such as courthouses, schools, EMS facilities, fire stations and jails. As a result, identifying and addressing any of these needs is often reactionary and "crisis driven," which results in response efforts that are more expensive and often less effective. Communities with limited resources can least afford to be reactive.

Interviews with public officials and others strongly suggest that public awareness of infrastructure issues in Keweenaw County follows this pattern. While some public officials cited specific known infrastructure issues, such as the lack of an adequate water supply in Copper Harbor, no comprehensive inventory and assessment of current infrastructure or overall plan for repairs, replacement or upgrades exists.

A Community Infrastructure Assessment will be a critical early activity for the community to identify which, if any, of these lands may be necessary to address the non-conservation needs of the area.

c. Understanding Current Utilization

Another critical early step for the Heartlands will be generating more and better data about the patterns of utilization for recreational, provisioning and other purposes. While this step does not have to be completed before the transition in ownership and management begins, better data and analysis will be prerequisites to

many of the ongoing stakeholder engagement processes and is critical information for effective management planning.

When interviewees and survey respondents were asked about how they use the land, a broad set of uses emerged. While the ATV, snowmobile, mountain bike and hunting and fishing users are well organized, and their uses get most public attention, the data show that less organized, more individual uses like tent camping, self-provisioning (gathering berries, mushrooms, etc.), kayaking, hiking and sightseeing far outstrip the organized uses by number of participants. However, these data do not quantify the intensity or frequency of various uses. In addition, unlike the ATV, snowmobile and mountain bike users who largely confine their activities to established trail networks, the locations where other activities are conducted are not well understood.

Both the principle calling for governing the Heartlands using data-informed plans and the principles seeking balance among various uses and separation of incompatible uses require a better understanding of which users are doing what, where and when.

Additionally, this Blueprint calls for the development of amenities that would improve the visitor experience and reduce the negative impacts of visitors' uses of the land. Some locations needing amenities such as parking, sanitary facilities, refuse containers or campsites may be self-evident. However, more study and data are required to best plan where to site amenities to distribute visitors more widely and reduce their impact on the Heartland's most popular features.

2. ESTABLISHING THE LONG-TERM GOVERNANCE STRUCTURE: ESSENTIAL GROUNDWORK FOR PHASE THREE

At the time of publication of this Blueprint, perhaps the most critical need for the Keweenaw Heartlands is to create a local governance structure for the portion of the Heartlands that is not conveyed to and directly managed by MDNR. That structure should provide mechanisms to coordinate with MDNR to maintain and align with the values identified in this Blueprint for the Keweenaw Heartlands.⁶² The Planning Committee was formed to affirm the community values that the governance structure is guided by, and the attributes of the governing structure that would best align with these values.

The Planning Committee and TNC spent nearly a full day at the Committee's final meeting in June 2023, discussing and planning how to tackle this critical task. The process they developed has five major steps:

- Finalize the Desired Governance Structure
- Complete the Necessary Legislative Process
- Create a Financial Sustainability Plan
- Create the New Governing Entity
- Develop and Implement a Land Transition Strategy

These steps are discussed in Sections a. through e., below.

a. Finalize the Desired Governance Structure

Finalizing the Governance Structure for the lands that are transferred to a local governing entity (vs. those acquired by MDNR) is envisioned by the Planning Committee and TNC as an iterative process. It must involve a series of discussions with local units of government, key legislators and the public. The Committee and TNC

⁶² Given its commitment to ensuring that local governments are made whole for revenues that would otherwise be lost as lands transition to public or nonprofit ownership, local stakeholders strongly prefer to see this governance structure own and manage any additional lands that may be conserved on the Keweenaw Peninsula.

identified the preferred structure discussed in Section 5 and charted a process to determine and adopt the final structure but understand that the structure and path may need to be adapted along the way. The key element is dialogue to ensure that stakeholders, local elected leaders and state legislators are all onboard with the final governance model recommended.

b. Complete the Necessary Legislative Process

No form of special purpose local unit of government currently authorized by Michigan law has all the critical or desired features described in Section 4 of this Blueprint. All the special purpose units of government currently enabled by Michigan law were created to address unique circumstances that could not be adequately addressed under previous law. Therefore, given the unique circumstances and the broad public consensus that has been developed in the Keweenaw Heartlands, it is reasonable to anticipate working with the Michigan Legislature to explore new legislation or statute modifications necessary to create the desired structure.

TNC's history of working with the Michigan Legislature and various state agencies to complete important conservation projects across the state makes it uniquely qualified to champion the process of obtaining necessary legislative approval and action. In addition, MDNR participated in the Project Oversight Team and all Planning Committee and Public Meetings associated with the Blueprint process. This provides the opportunity for MDNR to vouch for the process used to create this Blueprint and verify that the people of the Keweenaw and other stakeholders broadly supported it.

Working with the legislature to enable creation of a governance structure with the desired characteristics also requires an iterative process. This process has been ongoing for months as TNC staff have met with key legislators and their staff to inform and update them about the project's progress. Completion of the process is anticipated by early- to mid-2024 following the finalization of the desired governing structure discussed in the previous subsection.

c. Create a Financial Sustainability Plan

Given the small local population base and the limited amount of taxable property, stakeholders understand that local taxes are insufficient to take on the additional costs of managing the Heartlands. At every step of the stakeholder engagement process, stakeholders raised questions and concerns about how a governing entity would support management and operations of the Heartlands. Stakeholders see securing new sources of revenue as crucial to the ongoing success of The Heartlands' acquisition and preservation efforts.

Building a successful management and operations funding model requires a deep understanding of costs and revenues, and creation of a sustainable business plan that balances sources and uses of funds. Particular attention to short and long-term revenue opportunities ranging from carbon offset credits to concessionaire arrangements to parking and user fees will be required to ensure sufficient revenue to both meet management costs and to replace the economic contribution of the Heartlands to local government coffers.

Fortunately, consolidation under public ownership creates new opportunities for revenue generation. In addition, there is wide recognition that achieving the environmental and community benefits desired from The Heartlands will require a stable stream of operating revenues sufficient to cover management and operating costs. TNC has committed to helping community leaders quantify the financial need, identify likely and potential revenue streams and help the community secure appropriate technical assistance to put in place the revenue streams required for successful management of the Heartlands.

TNC also recognizes that these revenue streams may not be sufficient to support the most desirable level of management and operations for the Heartlands. Therefore, it has committed to assist community efforts to

establish an endowment to help support ongoing stewardship. TNC is also exploring potential sources of grant funds to help support Heartlands management and operations.

d. Create the New Governing Entity

Following enactment of necessary enabling legislation, TNC will collaborate with local elected officials and stakeholders to create the new governing entity before the lands pass into local ownership and management. The exact nature of this work cannot be fully determined until the legislation is enacted, but the legislation cannot be pursued until the necessary community conversations occur to focus in on the final desired attributes of the governing entity. We can anticipate that local and state officials and staff will, with TNC assistance, undertake the following steps in the coming months:

1. Draft proposed governing instruments and necessary explanatory materials.
2. Conduct an iterative review of the proposed governing instruments with community members and various stakeholder groups.
3. Secure statutory changes necessary to allow local government(s) to establish the governing entity with the desired authority, transparency and accountability mechanisms
4. Execute the required ordinances, public hearings and/or articles of incorporation and bylaws to establish the new entity.
5. Conduct elections or other activities as specified in the items executed under step 4 to operationalize the local entity.

In addition, once formed, a variety of steps will be required to create committees, adopt plans, etc. These steps can be informed by this and other Sections of this Blueprint but cannot be fully determined until the final form of the governing entity is settled.

e. Develop and Implement a Land Transition Strategy

TNC and MDNR have already begun to formulate transition strategies for portions of the Heartlands that MDNR desires to ultimately own. The first piece to transfer will likely be the sections subject to a grant currently recommended by the Michigan Natural Resources Trust Fund and included by the legislature in the appropriations for the MDNR for the fiscal year starting October 1, 2023. Transfer of other parcels is under discussion between MDNR and TNC. However, at the time of publication of this Blueprint it is premature to describe which parcels might transfer or the status of transfer plans and discussions.

While it will be important to develop and implement a strategy to transition lands to the new local governing entity, it is premature to discuss the specifics. The final structure will influence the specifics of the transition plan and the forms of funding available to support the land's purchase.

3. RECOMMENDED NEXT STEPS THAT ADDRESS CRITICAL COMMUNITY CHALLENGES

Robust stakeholder engagement has been a hallmark of Phase One and the creation of this Blueprint. Continuation of that engagement in the Phase Two transition and long-term throughout Phase Three is embodied in the governance principles set out in Section 4. It is also a strong expectation among the hundreds of stakeholders participating in the Blueprint development process.

Throughout the Blueprint development process, Keweenaw stakeholders shared their strong desire for the Heartlands' governing entity to adopt and follow data-informed plans, and that those plans be developed with

the kind of robust stakeholder engagement process used to create this Blueprint. Seven areas requiring additional stakeholder-driven planning and/or development emerged from interviews and planning committee discussions. They include the following and are briefly described below:

- Community Infrastructure
- Land Management
- Public Use and Access
- Public Safety
- Affordable Workforce and Family Housing
- Economic and Business Transition and Development
- Leadership Development

In addition, to use limited resources most efficiently and effectively and to honor the past work of Keweenaw community members, leaders and stakeholders, Planning Committee members, interviewees and public meeting participants expressed a strong desire to see existing plans acquired, analyzed and considered as a prerequisite to any additional planning and development. Existing plans should be collected and reviewed as a part of each process described below.

a. Community Infrastructure

An important task after creating the infrastructure inventory discussed in subsection 1.b. above, is to develop and adopt a plan or plans (in the case of multiple jurisdictions) to address the infrastructure needs identified in that assessment. Formalization of infrastructure plan(s) based on the inventory results has several advantages. An infrastructure plan:

- Prepares units of government and others to capitalize on grants and other programs that can assist with costs of needed infrastructure.
- Helps communities understand upcoming investment needs and set utility rates sufficient to accumulate the funds (or local match) for needed improvements or repairs.
- Increases points scored by applications for grant programs that prioritize projects included in a plan.
- Facilitates a program of preventative maintenance to maximize the life of existing infrastructure and avoid costly, inconvenient disruptions.⁶³
- Informs zoning and other land use decisions.
- Builds community consensus about how to best meet critical but controversial infrastructure needs such as cellular communications access.
- Creates public awareness and support for bond referenda or other infrastructure-related measures that require voter approval.

b. Land Management

The Management and Governance Principles and Values sections of this Blueprint call for the creation of a high-quality, comprehensive, land management plan once the land is transitioned into long-term public ownership. The forest management component of this plan is a requirement for continued enrollment of the land under

⁶³ For instance, the 2023 bridge collapse on M26, which, fortuitously, had been identified as a need and funded for the 2023 construction season.

Michigan’s Commercial Forest Act (CFA), as committed to by TNC for the Initial Phase of Heartlands ownership to ensure that local governmental entities continue to receive tax revenues from the land.⁶⁴

A land management plan is required to prioritize various and sometimes competing land uses. Documenting and recording trail and other easements are critical elements identified by the Planning Committee and other stakeholders. This Blueprint calls for the inclusion of both short and long-term protections for sensitive and valuable environmental, cultural, historical and geological resources and for zones that protect against activities that could damage these resources. The Planning Committee also suggested coordination between local zoning ordinances and the land management plan to ensure that uses on and adjacent to the Heartlands property are compatible.

c. Public Use and Access

At least two of this Blueprint’s Principles and Values for Land Management, “Preserve and Balance Historic Uses” and “Prudently Support the Visitor Economy,” require completion of a plan for public uses such as recreation, self-provisioning (harvesting berries and mushrooms, etc.) and accommodating the cultural or religious uses of Indigenous peoples.

Representatives of key stakeholder groups, such as the ATV, snowmobile, mountain biking and hunting and fishing clubs, have also expressed the desire of their groups to see their historic uses of the land reflected in formal planning documents. They want Heartlands’ plans to include selected enhancements or improvements that would benefit their constituents while remaining in keeping with the commitment to protect the Heartlands environmental, cultural, historical and geological assets.

Interviewees, survey respondents and public meeting attendees also expressed a desire to see a recreation and public use plan. Local landowners and those who participate in “quiet uses” were particularly emphatic about the need for a plan that protects and supports their ability to enjoy the land.

Absent such a Public Use and Access Plan, it is difficult or impossible to determine which trail improvements and which public amenities, such as sanitary facilities and parking, are necessary and prudent investments. A well-crafted plan could help to distribute visitor impacts, reducing the degradation of the Heartland’s most popular spots, and to steer visitors away from sensitive areas, preventing their damage. It could also address safety concerns, and de-conflict uses where they overlap. Finally, a well-crafted plan can help secure operating funds by including revenue strategies such as a user fee system or paid parking facilities.

d. Public Safety

As discussed earlier, like much of rural America, the Keweenaw Heartlands faces a crisis in affording and providing adequate public safety services to serve its people. The Heartlands, however, have an added burden of supplying public safety services for a population of visitors that at times far outstrips the population of year-round and seasonal residents. In addition, the property tax base is insufficient to pay for expanded services, and the volunteer-based model for providing emergency response is breaking down under the simultaneous pressures of an aging volunteer base, limited population growth and increased training requirements for new volunteers.

Keweenaw County has taken admirable first steps in addressing this problem, such as applying for funding to address the lack of facilities to support emergency response services. However, this is a long-term problem that likely requires a larger coordinated response and broader base of financial support than can be provided by the

⁶⁴ TNC is in the process of creating a Forest Management Plan at the time of publication of this Blueprint. Once the land transitions to public ownership, enrollment in CFA will no longer be possible, requiring other methods to replace tax revenue currently received by local units of government.

County taxpayers alone. Addressing this issue will require additional planning. Robust public engagement will be vital to ensure that the plans are acceptable to the taxpayers who must ultimately pay much of the cost while meeting the broader needs driven by recreational users and the tourism-dependent economy.

e. Affordable Workforce and Family Housing

As referenced in earlier sections, a recurring theme in interviews with business owners, economic development professionals and local elected officials is the need for more affordable workforce and family housing to support the economy of the region. This need has been growing over time as residents age in place, young people leave to pursue economic opportunities and family housing is converted into seasonal rentals. The situation has reached an inflection point where current businesses are unable to attract sufficient labor to meet their workforce needs because the workers have no place to live in reasonable proximity to the jobs available. Absent a strategy to address this issue, labor shortages will continue, commute times will get longer and the economy of the Heartlands will stagnate and likely decline.

Unfortunately, little available land suitable for housing development exists in nearby communities, so any strategy to address this need may require use of some of the Heartlands. Identifying the right parcels for this purpose will require a public engagement and planning process. Issues like availability of infrastructure, proximity to jobs and sites available for commercial development and strategies for maintaining affordability will be necessary components of such a plan. Stakeholder engagement, especially with residents and business owners, will be critical to developing a plan with sufficient public support and public/private investment to succeed over time. Engagement of state and regional organizations with resources and expertise to support these efforts will also be essential.

f. Business and Economic Transition and Development

Since the 1960's the Keweenaw Peninsula has been undergoing a slow transition from a mining and forest dependent economy to one based more on tourism. Heavy harvesting of its forests has depleted the remaining stocks of mature timber, foreshadowing an inevitable decline in the contributions of the forest products industry to the area's economy. The acquisition of the Heartlands property by TNC and the commitment to a transition to a sustainable model of working forestry will require substantial time to allow the forest to rest and regenerate, limiting the short-term economic contributions of forest products from these lands to the local economy.⁶⁵

While tourism has been on the rise, replacing some of the economic losses from the decline in the local forest products industry, the job-quality in a traditional tourism economy typically provides half or less of the economic contribution of jobs in forest products and similar extraction or production industries.⁶⁶ There are some rural areas in America that have successfully addressed this by creating a robust local artisans' and epicurean culture that produces higher-valued goods and services for visitor consumption and export to urban markets. However, deliberately identifying and including higher value production and services is often atypical of a strategy based solely on outdoor recreation.⁶⁷

⁶⁵ Despite this short-term decline, sustainable forest management will likely increase the long-term economic contribution of the Keweenaw's forests compared to present practices.

⁶⁶ Excluding owner-income generated by locally owned establishments whose profits generally flow back into the local economy. Absentee-owned establishments and corporate chains typically provide minimal (or no) economic benefit to rural tourism-based economies because low wage levels and a proliferation of part-time jobs with few employee benefits increases employee reliance on publicly supported benefits programs.

⁶⁷ See *Mapping a New Terrain: Call to Action*, Aspen Institute Community Strategies Group, April 26, 2023, for research about tourism-dependent economies and strategies for how to improve them.

Members of the community also identified that some private sales of property with limited specific conservation or cultural amenities that, with appropriate use restrictions, could be helpful in advancing the tourism economy, economic health and resilience of the region. Currently, there are only two transfers to private ownership under consideration, the current lease footprint of the Mt. Bohemia Ski Area and a small buffer to better control unauthorized motorized (snowmobile) encroachment at the Keweenaw Mountain Lodge. It is not known at this time if these transfers will occur during TNC ownership or after, or if they will occur at all.

The success of rural areas in increasing the economic contribution of tourism is generally dependent on a robust and well-planned local effort to develop value-added local products and services. These successful efforts generally include a strong set of local supports for entrepreneurs and artisans and a highly organized market-development program. This requires substantial local leadership, planning and stakeholder involvement. Keweenaw will likely be no exception.

In addition to the tourism economy, changing employment patterns that include hybrid and remote work are providing new opportunities for economic development across rural America. As noted by several interviewees, The Keweenaw, with its proximity to MTU (with its deep expertise in engineering, forestry and other technical fields in demand worldwide) has opportunities to develop as a desirable site for the location of technical consulting firms and engineering and technical resource centers for global companies. This type of economic development would provide more economic resilience and diversity than a heavily tourism-dependent economy can generate by itself. It can also help increase the pool of local customers for the tourism-based businesses during the shoulder seasons. The same amenities that attract tourism also make The Keweenaw a much more desirable place for this type of development to occur.

One prerequisite must be addressed in order to successfully tap into the region's potential for hybrid, remote and technical consulting-based development. The potential for this form of development requires robust telecommunications and Internet infrastructure, which currently do not exist in most rural areas of the Keweenaw Peninsula. Addressing this infrastructure gap will be essential for optimizing the economic prosperity, resilience and sustainability of the Keweenaw.

g. Community Leadership Capacity

With a local population of just over 2,100 people, Keweenaw County must develop a strategy to not only support its current leaders, but also surface and develop its potential pool of leaders to fill the many leadership positions required for a functioning society, including the ongoing governance and management of the Heartlands. Unlike an area with a larger population base, one cannot assume that it is possible to find enough willing candidates with a robust set of preexisting leadership experiences and skills to fill all the necessary leadership positions.

A consistent theme among interviewees and in Planning Committee discussions was the critical need for ongoing leadership capacity building. Ongoing attention to building leadership capacity will be a requirement for the ongoing governance of the Heartlands as well as for the other institutions required to maintain a healthy, thriving and prosperous local society.

Acknowledgements

Over the past two years, The Nature Conservancy has had the good fortune to be able to engage with the residents of and visitors to Michigan's Keweenaw Peninsula on the first phase of a project to assure the future of 32,541 forested acres known as the Keweenaw Heartlands. A project of this magnitude is not possible without the contributions of many individuals, and we would like to recognize some of those individuals here.

First and foremost, the Blueprint for the Keweenaw Heartlands represents the input of several thousand individuals who share two important commonalities, a deep affection for this landscape and the willingness to take the time to share their thoughts about what the future of this landscape, and the community it supports. The Blueprint would not be the robust, living document it is without their participation in this process.

We owe a special thanks to the members of the Planning Committee, each of whom invested many hours in meetings discussing the contents of this blueprint and many additional hours reviewing and commenting on multiple drafts. Their thoughtful and considered input will guide decisions for decades to come.

We want to thank the elected officials in Keweenaw County. These individuals contribute many hours every week serving their neighbors in myriad ways and the Heartlands Project has added to that workload. They have helped find meeting locations, introduced TNC staff to community members, made local offices available for meetings and responded to many questions. Their patience, willingness to be helpful and commitment to building their community's future will be one of the keys to this project's long-term success. In particular, we want to thank Keweenaw County Commissioners Don Piche and Bob DeMarois, who were the first individuals to meet with TNC staff about the Heartlands project and who form Keweenaw County's Keweenaw Heartlands Committee.

One of the driving forces behind this project well before TNC's involvement is the Keweenaw Outdoor Recreation Coalition (KORC). KORC first organized concerned members of the local community to elevate the serious risk posed by the possibility of the loss of access to the Heartlands and continues to be a collective voice of so many individuals who want to make sure the Heartlands are available for the enjoyment of all.

Many local businesses and organizations hosted meetings, prepared meals and offered guidance. Thanks to the Keweenaw Mountain Lodge, The Mariner North, The Harbor Haus, Grant, Eagle Harbor and Houghton Townships and Calumet-Keweenaw Public Schools.

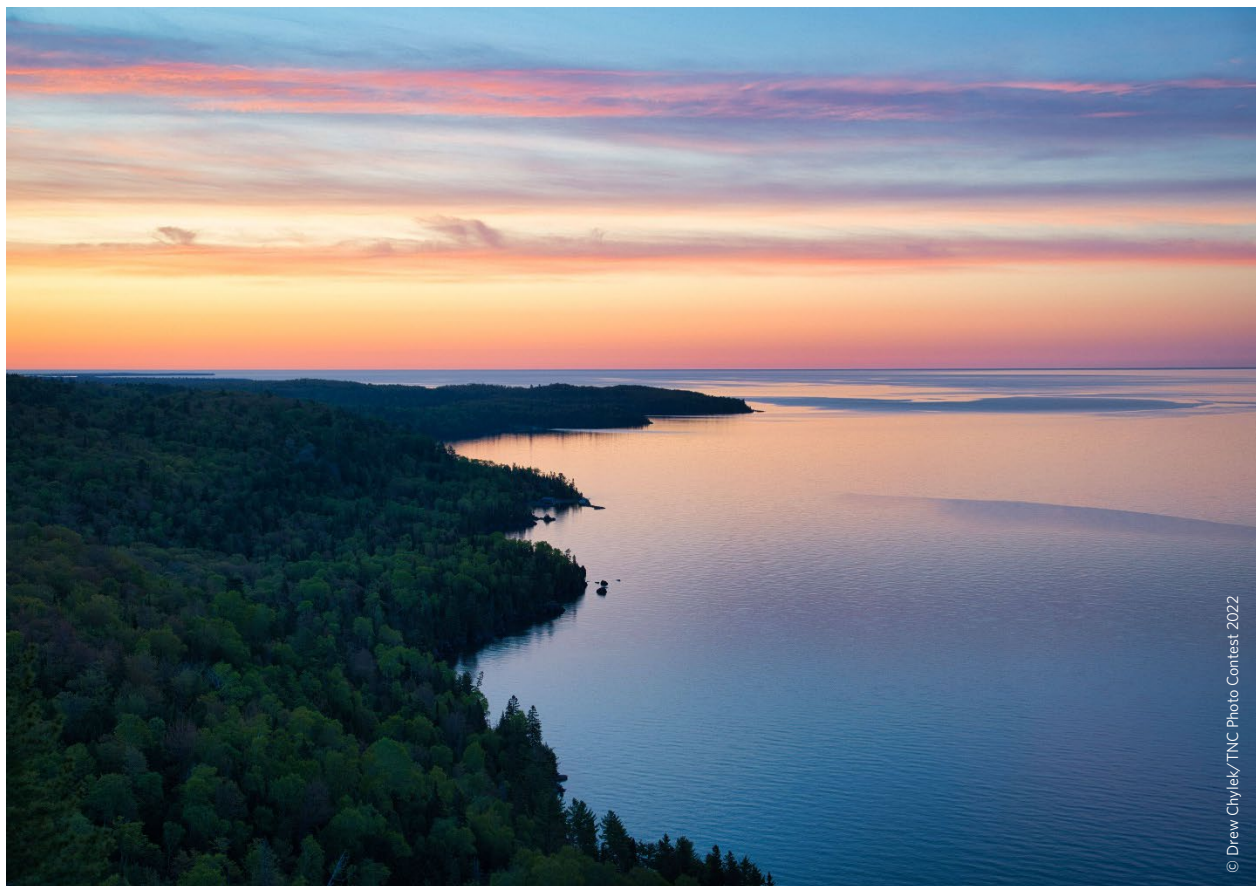
This project would not have been possible without the day-in, day-out on the ground support of the Keweenaw Community Foundation (KCF) and their Executive Director Robin Meneguzzo. KCF has been the trusted local partner hosting the information portal for the Keweenaw Heartlands on their website, and Robin's professionalism, flexibility and attention to detail assured that our engagements with the community and the planning committee were productive and allowed our team to focus on the task at hand.

This project also would not have been possible with the financial support of the C.S. Mott Foundation and the guidance of their Environment Program Director, Sam Passmore. Sam first suggested the need for the deep community engagement that has resulted in the Blueprint for the Heartlands.

While the Keweenaw Heartlands is a project of The Nature Conservancy, the success of the project to date is due to the support of the entire organization from the global Board of Director's who approved the project, to CEO Jennifer Morris, North American Director Jan Glendening, Global Managing Director for Protect Lands, Waters and Oceans, Jeffrey Parrish, and Midwest Regional Director Michael Reuter, who have all personally visited the Keweenaw Heartlands and engaged with community members. We also want to thank the staff of TNC's Michigan Business Unit who have all contributed in some way to the success of the Keweenaw Heartlands Project to date.

A special thanks is due to our partners in the project, The Michigan Department of Natural Resources. We would like to thank former MDNR Director Dan Eichinger, current Director Scott Bowen, Deputy Director Shannon Lott, UP Field Deputy Director Stacy Welling-Haughey, and Director of the Office for Public Lands Scott Whitcomb. All of them and their colleagues at MDNR have been engaged, supportive and encouraging as this project, and their agency, have gone through several transitions and continue to evolve. They have been a stalwart voice for the care of our shared natural and cultural resources and assuring that all residents and visitors to Michigan can access and enjoy those resources for generations to come.

Finally, we would like to thank John Molinaro and his team at R.E.S. Associates, who designed and executed the community engagement processes and facilitated the development of the Blueprint for the Keweenaw Heartlands. While the words in this document represent the thoughts and values of the people who care so deeply for the Heartlands, it was John's experience, skill and patience that has brought them together and brought them to life on these pages.



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APPENDIX A. John Molinaro Resume

John A. Molinaro	
87 University Estates Blvd. Athens, OH 45701	Phone: 740-447-1110 (mobile) E-mail: RuralEconomicSuccess@gmail.com
PROFESSIONAL EXPERIENCE	
1/2021 to present	<p>Principal, RES Associates, LLC (RES), Athens OH</p> <p>Co-founded consulting and professional services LLC to utilize 80+ years of experience of the principals in building the economies, developing and sustaining critical organizations and improving the lives and livelihoods of the people in rural communities and regions and small metropolitan areas.</p>
7/2012 - 10/2020	<p>President and CEO, Appalachian Partnership Inc. (API), Nelsonville, OH</p> <p>Retired October 31, 2020, from serving as the founding CEO of API, the first-ever region-wide economic development organization serving Appalachian Ohio. API'S mission is to promote enduring, widely-shared prosperity across Appalachian Ohio. API serves as a rural development hub for its region. It develops regional consensus and vision on approaches to building prosperity, serves as a launching pad for ventures and programs to implement those approaches, and provides a unified and cost effective administrative and back-office operation to support them.</p> <p>API's OhioSE subsidiary is a part of the JobsOhio Network – one of six regional business-led nonprofits working with JobsOhio, a statewide business-led nonprofit, as part of the privatization of economic development for Ohio. API operates two additional subsidiaries, Appalachian Growth Capital (AGC), a certified CDFI that provides small business lending in the region and Appalachian Wood Products, LLC (AWP), a cluster initiative focused on increasing the profitability and local economic contribution of the region's sustainable hardwood forests.</p> <p>Together, API, OhioSE, AGC and AWP provide a comprehensive set of services that uplift the economy and build prosperity. API develops plans, strategies and priorities to advance the regional economy and works directly with companies to build productivity, profitability and competitiveness. OhioSE serves as the "front door" for State economic development incentives and financing programs, undertakes a targeted program of business recruitment, retention and expansion supports and builds capacity of local economic development organizations. AGC fills critical gaps in private sector financing to support business growth and AWP directly supports the thousands of small companies that comprise the region's hardwood products industry.</p> <p><u>Primary Responsibilities:</u></p> <ul style="list-style-type: none"> • Responsible to the board of directors for all aspects of API's management and operations • Develop and implement plans and strategies for advancing regional prosperity • Design staffing model and hire and supervise staff to advance API's mission • Achieve aggressive metrics for regional economic growth
2/2006 - 6/2012	<p>Co-Director, Community Strategies Group (CSG), The Aspen Institute, Washington DC</p> <p>CSG is a unit at The Aspen Institute that engages community leaders, along with funders, advisers and networks who work with them, as they adapt proven methods, pioneer new approaches, and seek breakthroughs that make a greater difference in the livelihood, economy, culture and sustainability of the places they love, and of the families who live and work there. CSG's mission is focused on rural and small metropolitan markets.</p> <p><u>Primary Responsibilities:</u></p>

	<ul style="list-style-type: none"> • Work with development organizations, communities, foundations and others to improve practice and outcomes for organizations and the communities they serve • Design and facilitate programs to help community and organizational leaders build strong partnerships, develop skills, learn from each other and improve outcomes • Provide expert assistance and advice to communities and organizations to help improve practices, operations and outcomes and tackle tough development issues • Assist organizations and associations in development of Theories of Change to help them identify and understand the complex interaction of factors that influence desired outcomes and plan more effective strategies to affect the change they seek • Manage large initiatives for private foundations and others to maximize outcomes, learning, knowledge transfer and skill development of participating organizations or individuals and to address substantial community and regional challenges • Take the lead in CSG contracting, proposal development and financial management
9/1986 -1/2006	<p>Vice President, Program, West Central Initiative (WCI), Fergus Falls, MN</p> <p>WCI is a community foundation and regional development organization serving an 8,500 square mile region in western Minnesota. Supervised all program activities and related staff focused on grantmaking, community, economic and workforce development, leadership development and regional planning, and all special projects of the foundation. Gained and maintained federal economic development district status. Anticipated a serious regional labor shortage in 1991 and developed a leading-edge program that revitalized the region's economy through targeted investments in economic development and workforce training. Built and maintained numerous relationships with business and community leaders. Responsible for organizational strategic planning. Lobbied Minnesota legislature on various development issues.</p>
5/1982 - 9/1986	<p>Executive Director, Center for Parents and Children. Moorhead MN</p> <p>Responsible to a Board of Directors for all aspects of the management, operations, planning and finances of a child abuse and family counseling center. Conducted 200 speaking engagements per year. Tripled income. Quadrupled direct service hours. Brought organizational finances into the black and consistently maintained profitable operations. Lobbied North Dakota and Minnesota Legislatures on child abuse related issues.</p>
12/1979 - 5/1982	<p>Planner, Fargo-Moorhead Metropolitan Council of Governments, Moorhead, MN</p> <p>Responsible to Executive Director for a variety of planning duties, particularly in the area of transportation. Developed the first federally-approved transit plan for Fargo-Moorhead. Conducted various studies. Developed the methodology and wrote the grant resulting in the first-ever use of federal highway safety funds for pedestrian skywalks in a metropolitan business district. Wrote a successful \$5 million federal grant for a multimodal transportation terminal.</p>
EDUCATION	
1999-2000	Policy Fellow, Hubert H. Humphrey Institute of Public Affairs - University of Minnesota
1993-1994	James Shannon Leadership Institute - University of St. Thomas
1982	Masters of Community and Regional Planning - North Dakota State University
1977-78	Graduate study, Hamma School of Theology - Wittenberg University
1976	Bachelor of Arts, English Writing - University of Pittsburgh
PROFESSIONAL CERTIFICATIONS AND APPOINTMENTS	
2019 - 2021	Community Advisory Council - Federal Reserve Bank of Cleveland (appointee)
2016	Council on Underserved Communities - US Small Business Administration (appointee)

2002 - 2006	Governors Workforce Development Council – State of Minnesota (two-term appointee)
1997	Housing Development Finance Professional Certification – National Development Council
1994	Economic Development Finance Professional Certification – National Development Council
TOPICAL EXPERTISE	
Communities and Economies (especially rural)	<ul style="list-style-type: none"> • Regional Wealth Creation & Retention • Community Development • Economic and Housing Development • Workforce Development • Leadership Development • Extractive Economy Boom and Bust Cycles • Comprehensive Community Change Initiatives
Philanthropy and Nonprofits	<ul style="list-style-type: none"> • Rural Development Philanthropy • Community Leadership Philanthropy • Community, Private & Corporate Foundations • Governance Models & Best Practices • Legal, Tax Exemption & Regulatory Issues • Organizational Development
Organizations	<ul style="list-style-type: none"> • Continuous Improvement Systems • Budget, Finance & Investment • Fund Development • Leadership & Management • Personnel Administration & Supervision • Program & Service Design & Delivery • Strategic Visioning & Planning
Families	<ul style="list-style-type: none"> • Family Economic Success & Self Sufficiency • Asset-building • Multi-generational Advancement Strategies • Poverty Reduction Policies, Strategies & Services • Child Abuse & Neglect Prevention & Treatment • Family Counseling & Therapy Models & Services

APPENDIX B. Planning Committee and Project Oversight Committee Members

PLANNING COMMITTEE	
ORGANIZATION	COMMITTEE MEMBERS)
Calumet Keweenaw Sportsmans Club	Richard Marsh
Copper Harbor Trail Club	Adam Yoeman
Eagle Harbor Township	Rich Probst
Grant Township	Scott Wendt (through 8/2022) Gregory Paul Lis (beginning 8/2022)
Keweenaw ATV Club	Daryl St John
Keweenaw Bay Indian Community	Brigitte LaPointe
Keweenaw Community Forest Company	Gina Nicholas
Keweenaw Convention & Visitors Bureau	Brad Barnett
Keweenaw County	Don Piche Bob Demarois
Keweenaw County Sheriff	Curt Pennala
Keweenaw Economic Development Alliance	Jeff Ratcliffe Ex. Dir.
Keweenaw Land Trust	Evan McDonald
Keweenaw National Park Advisory Committee	Sean Gohman
Keweenaw Snowmobile Club	Dave Donnay
Mariner North	Don Kauppi Peg Kauppi
Michigan Technological University	Dave Reed
Sherman Township	Harvey Desnick

PROJECT OVERSIGHT COMMITTEE	
ORGANIZATION	COMMITTEE MEMBERS
Michigan Department of Natural Resources	Scott Whitcomb Patrick Mohney
The Nature Conservancy	Helen Taylor Richard Bowman

APPENDIX C: Ownership Models Presentation and Discussion

Keweenaw Heartlands: Potential Ownership Models

OVERVIEW

The Nature Conservancy (TNC) recently acquired more than 32,000 acres in the Keweenaw Peninsula, known as the Keweenaw Heartlands. TNC is working with State and Local officials and representatives of various user and community interests to develop a governance and management plan to steward the Keweenaw Heartlands in a way that is both sustainable and beneficial for residents, visitors, local businesses and surrounding communities. As part of this effort, TNC asked Public Sector Consultants (PSC) to research and compile information about land ownership and governance frameworks that have been applied in various land management contexts throughout Michigan and in other states that may be used to inform the future governance, management and ownership of the Keweenaw Heartlands.

For each framework, PSC compiled information about governance and revenue structures, land use requirements, reporting and operating requirements, creation and dissolution of ownership and management structures, and other relevant information. This memo is not intended to provide in-depth detail about any framework, but rather a high-level overview of the key information listed above. Links to more detailed information about the frameworks are provided throughout the memo and in the references section at the end of this document.

In-State Ownership and Governance Frameworks

MICHIGAN MUNICIPAL FOREST

Part 527 (Municipal Forests) of the Natural Resources and Environmental Protection Act (NREPA; [MCL 324.52701 to 324.52710](#)) allows for the creation of municipal forests. Any municipality (county, township, city, village, or school district) may purchase or use land already in its possession for forestry purposes. Municipal forestland can also be used recreationally so long as the recreation activities do not interfere with forestry operations. The land may be located either within or outside the municipality's territorial limits. A municipal forest is supervised and managed by a three-member forestry commission, the members of which are appointed by a legislative body of the municipality. The municipality may appropriate money to manage the land, and any income from the land shall be paid into the municipality's general fund or may be set up in a special forestry fund. The forestry commission is responsible for expending money to supervise and manage the forest. An annual report must be submitted to the legislative body of the municipality and the Michigan Department of Natural Resources (DNR).

COUNTY AND REGIONAL PARKS AND RECREATION COMMISSIONS

Public Act 261 of 1965 ([MCL 46.351 to 46.367](#)) authorizes the creation of and prescribes the powers and duties of county and regional parks and recreation commissions. A parks and recreation commission has the general responsibility to oversee the maintenance and operation of a county or regional park system. A county parks and recreation commission may be created via a resolution adopted by a two-thirds vote of a county board of commissioners, while a regional parks and recreation commission may be created via a resolution adopted by a two-thirds vote of the members of each board of commissioners of two or more contiguous counties. Parks and recreation commissions consist of about ten members, the makeup of which is prescribed in statute. Commissions may acquire and oversee property either within or contiguous to their territorial boundaries. A

county may appropriate money to provide for the expenses of a parks and recreation commission, and revenue may also be collected from vehicle entry and user fees. Commissions are required to file with the DNR a record of land ownership, proposals for acquisition of land, and general development plans and programs for improvement and maintenance of land.

METROPARK AUTHORITY

Public Act 147 of 1939 ([MCL 119.51 to 119.62](#)) provides for the incorporation of the Huron-Clinton Metropolitan Authority (HCMA), which is a regional special park district encompassing five counties in southeastern Michigan. Residents of the five counties approved the formation of the HCMA in 1940. The authority is directed and governed by a seven-member board of commissioners. One commissioner from each county is elected by the public and two commissioners are appointed by the governor of Michigan. The HCMA generates funding through its authority to levy a property tax and revenues from vehicle entry fees and user fees. Lands located within the limits of the district may be purchased by or gifted to the authority. The authority may also sell lands within its possession. A written or public record of every session of the board of commissioners must be maintained, and a yearly audit of accounts conducted.

CONSERVATION DISTRICT

Conservation districts (CDs) are local units of state government that use state, federal, and private sector resources to address conservation challenges (see Part 93 of NREPA; [MCL 324.9301 to 9313](#)). There are currently 75 CDs in the state. Each CD is governed by a five-member board of directors, elected at the annual meeting of the conservation district by residents of the district who are in attendance at the meeting. A resident who wishes to vote and is unable to attend may vote by absentee ballot in person or by mail. Director elections must be certified by the Michigan Department of Agriculture and Rural Development and Directors serve until a new director is certified. The board selects its chairperson and may hire employees to help carry out the purposes of the CD. District may receive public or private grants, gifts, earned revenues and may receive government allocations. To be eligible for grant funding greater than \$50,000 from the Michigan Department of Agriculture and Rural Development (MDARD), CDs must submit an annual budget, maintain financial records, and complete a biennial audit. CD law does address any rules or requirements associated with land owned by a CD, though land may be acquired with requirements on how the land may be managed. CDs may sell, lease, or otherwise dispose of any property or interests in property.

WATERSHED ALLIANCE

Part 312 (Watershed Alliances) of NREPA ([MCL 324.31201 to 324.31206](#)) allows for the creation of a watershed alliance (WA). Two or more municipalities may, by resolution of their respective governing bodies, establish a WA. The establishing resolution shall include bylaws that identify the structure of the organization and the decision-making process. Watershed alliances may be funded by user fees, grants, gifts, earned income, or by public funds allocated for use by a watershed alliance. A financial audit is required at least every other year, in addition to an annual report. See the [Alliance of Rouge Communities](#) and [Alliance of Downriver Watersheds](#) for examples of WAs. Because the statute specifically refers to watersheds, this structure may not be applicable to forestry purposes. However, this structure can serve as an example of legislation created to solve a land management challenge.

MUNICIPALLY OWNED CORPORATION

A municipality may form a municipally owned utility, which is a corporation owned and operated by a local government (e.g., a city, village, or township) to provide utility services to its residents ([MCL 460.10y](#)). The utility's governing body determines the decision-making processes and policies of the corporation, and the revenue structure is based on the sale and provision of utilities. [The Lansing Board of Water & Light](#) is an

example of a municipally owned utility. Because the statute specifically refers to utilities, this structure may not be applicable to forestry purposes.

BROWNFIELD REDEVELOPMENT AUTHORITY

Public Act 381 of 1996 ([MCL 125.2651 to 125.2672](#)) authorizes a municipality to create a brownfield redevelopment authority (BRA). BRAs help redevelop brownfields, which are blighted, contaminated, or functionally obsolete properties. BRAs function under the supervision and control of a board of directors. The board may adopt, amend, and repeal bylaws for the regulation of its affairs and conduct of its business. BRAs may be funded under several mechanisms, including grants, gifts, government allocations, and through a local brownfield revolving fund or state brownfield redevelopment fund. BRAs must submit a brownfield plan to be eligible for funding from certain sources. They are also required to submit an annual budget and financial report, in addition to certain documentation for active projects. Land may be taken or transferred to a BRA for use as authorized in a brownfield redevelopment plan, if the taking, transfer, or use is considered necessary for public purposes and for the benefit of the public. A BRA that completes the purposes for which it was organized shall be dissolved by resolution of the municipal governing body.

PIGEON RIVER COUNTRY ADVISORY COUNCIL

The [Pigeon River Country Advisory Council](#) was established by the DNR in 1974 in response to the oil drilling controversy surrounding the Pigeon River Country State Forest. The council considers and advises the DNR on plans, programs, and activities proposed for, conducted within, or affecting the Pigeon River Country State Forest. One of the council's primary roles is to develop public support and local cooperation for programs adopted for the forest. Members of the 18-person council are appointed by the DNR. The council consists of representatives of certain organizations (e.g., Michigan Environmental Council, Huron Pines, West Michigan Environmental Action Council, etc.), at-large members, and state employees from the DNR and EGLE who serve as nonvoting ex-officio members. The council is not funded, nor does it seek or raise funding. The council's articles of organization require the council to meet at least four times a year.

KALAMAZOO RIVER COMMUNITY RECREATIONAL FOUNDATION

The [Kalamazoo River Community Recreational Foundation](#) was established in 2013 by Enbridge, Inc., to ensure a series of sites are maintained for public access to the Kalamazoo River. The foundation oversees an endowment established to provide for the long-term maintenance of these sites that was included as part of the settlement in response to the 2010 Kalamazoo River oil spill caused by the rupture of Enbridge's Line 6B pipeline. The initial capitalization of the endowment was \$2.5 million, with the understanding that the endowment would exist in perpetuity. The foundation administration is handled by a third party and is overseen by a board of seven directors consisting of Enbridge personnel and other individuals who have been closely involved with site development and management.

The foundation has facilitated development of detailed site use and management guides for each site to assist with site maintenance and long-term care. The guides provide basic information about each site's development; identify key site components and products; and, most importantly, establish expectations for the care of the sites.

NGO MECHANISMS

Nongovernmental organizations (NGOs) may be involved in land ownership and/or land management in a variety of ways. This may include collaboration with other entities (such as government organizations, nonprofit organizations, private groups, etc.) as a friends group, landowner, land manager, or some combination thereof. When collaborating, formal agreements are generally in place regarding roles and expectations. NGOs may also

act as the sole landowner and land manager. The [Fenner Nature Center](#) is an example of an NGO as a land manager and the [Keweenaw Land Trust](#) is an example of an NGO as a land owner.

LEGISLATIVE INITIATIVE

A new mechanism created by legislative action may be used to provide the framework and funding for the governance of the Keweenaw Heartlands. The previous examples of ownership and governance were developed in response to unique land management challenges. Similarly, a new legislative initiative could be established that provides a way to manage and maintain the Keweenaw Heartlands in a way that is uniquely suited for the issue at hand.

Out-of-State Examples

BAILEYS TRAIL SYSTEM PROJECT

The [Baileys Trail System Project](#) is a community and economic development project centered around building an 88-mile mountain biking trail system in Southeast Ohio. The project is managed by the [Outdoor Recreation Council of Appalachia \(ORCA\)](#) in partnership with the Wayne National Forest. ORCA is a regional council of governments authorized under [Chapter 167 of the Ohio Revised Code \(ORC\)](#) and is made up of representatives from five local governments, including the City of Athens, City of Nelsonville, Village of Chauncey, York Township, and Athens County. Pursuant to ORC Section 167.03(A), ORCA is granted certain powers, including (but not limited to) identifying, funding, and overseeing outdoor recreation projects; applying for and administering grants; performing planning activities; and coordinating action among its members and other government agencies. ORCA is working with a number of partners (e.g., the Athens County Foundation, Quantified Ventures, Sugarbush Valley Impact Investments, the Athens Wayne Outdoor Asset Development Corporation, and others) to fund and implement the project.

CALIFORNIA STATE PARKS FOUNDATION

The California State Parks Foundation (CSPF) is an independent, member-supported nonprofit organization. The organization was founded in 1969 to partner with the California Department of Parks and Recreation in protecting and preserving California's state park system. According to information available on [CSPF's website](#), the organization supports California's state park system by acquiring land; advocating for park funding, access, and protection; providing grants; raising funds; and working with volunteers to protect and preserve the state park system.

MINNEAPOLIS PARK AND RECREATION BOARD

The [Minneapolis Park and Recreation Board \(MPRB\)](#) is a semi-autonomous body consisting of nine commissioners that is responsible for governing, maintaining, and developing the Minneapolis Park System. The MPRB was created by an act of the Minnesota State Legislature and vote of Minneapolis residents in 1883. Of note, the MPRB can levy property taxes within certain parameters. Every four years, voters in the city elect nine commissioners: one from each of the six park districts and three that serve at large. According to the [Parks For All: MPRB Comprehensive Plan 2021-2036](#), most of the funding (approximately 70 percent) for the Minneapolis park system comes from property tax collection. Other sources of revenue include state and local government aid, user fees and fines, grants and donations, parking, rent, and charges for service.

Table C1. In-state Frameworks

Name of Framework	Governance Structure	Revenue Structure	Statutory Authority (If Applicable)
Michigan Municipal Forest	<ul style="list-style-type: none"> Supervised and managed by a 3-member forestry commission Commissioners appointed by legislative body of the municipality Commissioners serve 4-year terms 	<ul style="list-style-type: none"> Municipality may appropriate money to carry out the purposes of the act Income generated from forest land May receive, expend, or hold in trust gifts of money or property 	Natural Resources and Environmental Protection Act (NREPA): PA 451 of 1994, Part 527 (MCL 324.52701 to 324.52710)
County Parks and Recreation Commission	<ul style="list-style-type: none"> Under general control of the county board of commissioners Commission consists of at least 10 members who serve 2-3-year terms depending on appointment 	<ul style="list-style-type: none"> County may provide for expenses of commission in its annual budget May accept gifts, grants, contributions, and appropriations of money and other property May charge and collect user fees 	County and Regional Parks: PA 261 of 1965 (MCL 46.351 to 46.367)
Regional Parks and Recreation Commission	<ul style="list-style-type: none"> Commission consists of at least four members from each county (chairperson of the county road commission or another road commissioner and three members appointed by the county board of commissioners) and three members who are appointed by the county board of commissioners Commissioners serve 1-3-year terms 	<ul style="list-style-type: none"> Participating counties shall provide funds for the commission's operations by an appropriation from the general fund of the county or by a tax levy authorized by vote May accept gifts, bequests, grants, contributions and appropriations of money and other property May charge and collect user fees 	County and Regional Parks: PA 261 of 1965 (MCL 46.351 to 46.367)
Metropark Authority	<ul style="list-style-type: none"> Directed and governed by a board of commissioners One commissioner elected from each county and two appointed by the governor of Michigan Commissioners serve varying term lengths 	<ul style="list-style-type: none"> May levy a tax of up to ¼ mill May issue self-liquidating bonds May sell lands within the district May fix and collect user fees 	Huron-Clinton Metropolitan Authority: PA 147 of 1939 (MCL 119.51 to 119.62)
Conservation District	<ul style="list-style-type: none"> Governed by a board of 5 directors Board members elected at annual meeting and must be residents of the district Directors serve 4-year terms 	<ul style="list-style-type: none"> Revenue structure mostly grant driven May receive support from local, state, or federal governments Annual tree sales, events, and provision of technical services 	NREPA: PA 451 of 1994, Part 93 (MCL 324.9301 to 324.9313)
Watershed Alliance	<ul style="list-style-type: none"> Not explicitly addressed in statute, though establishing resolution shall include bylaws that 	<ul style="list-style-type: none"> May assess and collect fees from members 	NREPA: PA 451 of 1994, Part 312 (MCL 324.31201 to 324.31206)

Name of Framework	Governance Structure	Revenue Structure	Statutory Authority (If Applicable)
	<ul style="list-style-type: none"> identify the structure of the organization and the decision-making process 	<ul style="list-style-type: none"> May solicit grants, gifts, and contributions from public and private sources Watershed alliance members may allocate the use of public funds from fees, taxes, or assessments for use by the watershed alliance 	
Municipally Owned Corporation	<ul style="list-style-type: none"> Corporation is owned and operated by a local government (city, village, or township) Governing body determines decision making processes and policies 	<ul style="list-style-type: none"> Revenue structure based on sale and provision of utilities 	Michigan Public Service Commission: PA 3 of 1939 (MCL 460.10y)
Brownfield Redevelopment Authority	<ul style="list-style-type: none"> Supervised and controlled by a board of directors that is chosen by the governing body Board may adopt, amend, and repeal bylaws for the regulation of its affairs and conduct of its business 	<ul style="list-style-type: none"> Municipality may appropriate funds to the authority May accept grants and donations of property and labor May invest the money of the authority May buy and sell loans May incur and expend funds from a local brownfield revolving fund or state brownfield redevelopment fund 	Brownfield Redevelopment Financing Act: PA 381 of 1996 (MCL 125.2651 to 125.2672)
Pigeon River Country Advisory Council	<ul style="list-style-type: none"> Council made up of 18 members (have organizational representation and at large members) All members appointed by the Michigan Department of Natural Resources (DNR) Role is advisory - no governing authority 	<ul style="list-style-type: none"> Not funded. Does not seek or raise funding 	
Kalamazoo River Community Recreational Foundation	<ul style="list-style-type: none"> Overseen by a board of seven directors, who are appointed for 3 years with staggered terms Administration handled by a third party 	<ul style="list-style-type: none"> Funded by an endowment that is expected to exist in perpetuity 	
NGO Mechanism	<ul style="list-style-type: none"> Varies depending on contract/agreement 	<ul style="list-style-type: none"> Varies depending on contract/agreement 	

Table C2. Out-of-state Frameworks

Name of Framework	Governance Structure	Revenue Structure	Statutory Authority (If Applicable)
Baileys Trail System Project (Ohio)	<ul style="list-style-type: none"> Managed by a regional council of governments (COG) in partnership with the Wayne National Forest 	<ul style="list-style-type: none"> Project supported by outcome-based financing around outdoor recreation, as well as public and private investment COG member governments may appropriate funds to meet the expenses of the COG COG may accept funds, grants, gifts, and services from other governmental units 	Ohio Revised Code, Title 1, Chapter 167
California State Parks Foundation	<ul style="list-style-type: none"> Overseen by a board of trustees Employs about 20 staff to help conduct its business 	<ul style="list-style-type: none"> Donations and gifts from individuals, foundations, and corporations Government grants 	
Minneapolis Park and Recreation Board	<ul style="list-style-type: none"> Governed by 9 commissioners – one from each of the six park districts and three that serve at large Commissioners elected by city residents every 4 years 	<ul style="list-style-type: none"> Most funding comes from property tax collection Other sources of revenue include state and local government aid, user fees and fines, grants and donations, parking, rent, and charges for service 	Created by an act of the Minnesota State Legislature and vote of Minneapolis residents in 1883