

Ebey's Landing National Historical Reserve Trust Board Strategic Plan 2020 - 2025

Executive Summary

In April of 2019, the Trust Board of Ebey's Landing National Historical Reserve undertook a strategic planning exercise intended to evaluate operational strengths and challenges and shape priorities for the coming five years. With Trust Board NPS appointee David Louter's assistance, the National Park Service, Pacific West Region, provided funding to engage the services of facilitator Robert Steelquist who led three special workshops with the Trust Board, staff and partners, and guided the development of a Draft Strategic Plan. Between June and September, the Trust Board and staff devoted additional workshops and meetings to refining the draft. The final plan was approved by the Trust Board in October 2019.



Introduction

Encompassing 17,572 acres of Central Whidbey Island, Ebey's Landing National Historical Reserve is a unique geographic area established in 1978 to protect a rural community and its unbroken history of exploration and settlement in Puget Sound. While there are federal, state, town and county lands within the Reserve, the majority (85 percent) is privately owned. Protection is accomplished through conservation easements, local land use regulation, and the cooperation of land owners.

The Reserve concept grew out of a need for a new means of protecting areas of national concern where traditional concepts were not appropriate. This new approach combined the capabilities and resources of the local, State and Federal governments, and the private sector, to protect the resource. Early planning documents use the term Areas of National Concern to refer to areas in which Federal, State and local governments form a special partnership around an area to be protected. A definition of National Reserve developed by the Trust Board describes National Reserves as *"Areas of land and water containing nationally significant resources in which federal, state, and/or local governments, along with private individuals, groups and/or organizations, combine efforts to manage, protect, and interpret the valued resources."*

The hallmark characteristic of these areas is collaboration between a federal entity and one or more non-federal entities, for the purpose of protecting nationally significant resources. At Ebey's Landing National Historical Reserve this collaboration occurs through a Trust Board, a joint administrative board representing four government partners bound by a formal Interlocal

Agreement: the National Park Service, Island County, Town of Coupeville, and Washington State Parks and Recreation Commission.

While each of these partners maintains its own jurisdiction according to the land they administer, the Trust Board helps coordinate the partnership, and assume certain responsibilities for day-to-day management. Currently these responsibilities include administration of the Department of the Interior's scenic easements; advising the partners on matters relating to the reserve; participating in local government planning and preservation; and accomplishing specific administration, land protection, maintenance, interpretation, and visitor services responsibilities, as outlined in an NPS Cooperative Agreement.

Trust Board's Purpose

In response to the enabling legislation's call for a plan to be developed in cooperation with local government, a local committee known as the Ebey's Landing National Historical Reserve Planning Committee prepared an initial Conceptual Plan for the Reserve. Out of concern for maintaining local management of the Reserve, the Planning Committee developed the concept of a Trust Board of appointed citizens to coordinate management of the Reserve. The Trust Board would balance the interests of the community, private property owners and government partners. They would make sure the Reserve maintained a viable working community including the continuation of agriculture and the harvesting of forest resources as well as the Town of Coupeville's interdependent relationship to the surrounding rural area. Several members of the Planning Committee eventually volunteered to serve on the Trust Board.

As part of this Strategic Planning process, the Trust Board developed a new mission statement that is closely tied to the enabling legislation and purpose of the Reserve:

The Trust Board works through partnerships to preserve and protect Ebey's Landing National Historical Reserve so it forever remains a living, rural community with an unbroken historical record.

Significance of the Reserve Model

Although the Reserve was established first and foremost to protect and preserve a rural community and its historical record, the Trust Board feels strongly that the Reserve model itself is also worthy of protection. When it was established, it represented a distinct approach to national stewardship that did not previously exist. Its foundation was a desire to demonstrate that collaboration was a powerful preservation tool, and that various levels of government and private citizens can work together to protect outstanding natural and cultural areas. These concepts are evident in the enabling legislation and early planning documents for Ebey's Landing National Historical Reserve.

Legislative History and Critical Documents

Strategic Planning workshop #2 included a review of the enabling legislation and early planning documents that direct or define the reserve model and the Trust Board's work and priorities. The following were especially important to the "What We Do" and "Why We Do It" discussion that contributed to the development of an updated Trust Board Mission Statement.

1972 Central Whidbey Island Historic Preservation District (Island County):

Central Whidbey Island has a long history of grassroots and local government awareness and support for historic preservation. The 1972 Preservation District represents the formation of an Island County "Preservation District" that preceded the later National Register Historic District and Reserve. The boundaries of the Preservation District recognize Central Whidbey's Donation Land Claims as an area worthy of recognition and protection.

1973 (revised 1998) Central Whidbey Island Historic District (CWIHD):

As development concerns for Ebey's Prairie increased, the community looked to strengthen protection and preservation with a National Register District very similar to the concept of the County's Historic Preservation District. Especially important is that the enabling legislation would later adopt the boundaries of the CWIHD as the Reserve's boundaries.

1978 National Parks and Recreation Act - PL 95-625 (sec. 508):

PL 95-625 was a broad piece of federal legislation with sub-sections establishing or expanding park and conservation areas (Section 508 is the section relevant to the Reserve). Often referred to as "the enabling legislation," it is the federal legislation that established Ebey's Landing NHR in 1978 and represents the intent of Congress for the Reserve.

1980 Comprehensive Plan for Ebey's Reserve:

The 1980 Comprehensive Plan was prepared in response to the enabling legislation's direction that the NPS, in cooperation with the appropriate state and local units of government, would prepare a comprehensive plan for the preservation, protection and interpretation of the Reserve. The plan has two parts: an NPS plan representing advice and guidance of the NPS, and a Conceptual Plan developed by local government and citizens (the Ebey's Landing National Historical Reserve Planning Committee). The Planning Committee would identify objectives for different use areas, envision the management partnership, and recommend the establishment of a Trust Board to coordinate operation of the Reserve. It would eventually transition into the Trust Board. The Comprehensive Plan represents the beginning of intergovernmental planning and implementation of the Reserve Concept in Ebey's Reserve.

1983 NPS Statement for Management (SFM):

An SFM is a summary level description of the purpose, resources and planning objectives for an NPS area. The function of an SFM is to provide official guidance (for staff, elected officials, etc.) and inform early decision making. Generally, they would be replaced by updated planning documents but the SFM for Ebey's Reserve is useful as a snapshot of the early vision for the Reserve as the model began to be implemented.

1984 NPS Land Protection Plan (LPP):

NPS areas that expend public funds for acquisition of land or interests in land (such as scenic easements) are required to have a Land Protection Plan that addresses what lands or interests are prioritized acquisition. The Reserve's LPP is a key document because it implements the vision of the enabling legislation (public, private use areas) and lays out the preference for non-fee means of land protection, which was a new concept at the time.

1988 Interlocal Agreement for the Administration of Ebey's Landing NHR:

The Interlocal Agreement defined the Trust Board, formalized the partnership, and laid out the powers and duties of each partner. The citizen-driven Ebey's Landing National Historical Reserve Planning Committee (the committee that worked on the conceptual plan in the Comprehensive Plan) transitioned into the Trust Board (a joint administrative board).

1988 (revised 2006) Trust Board Rules of Procedure (ROP):

Signed by each of the four partners of the Interlocal Agreement, the ROP establish procedures for the Trust Board's membership, operation (appointments, terms, officers, elections, etc.), meetings, reporting, and other details.

NPS-Trust Board Cooperative Agreements:

A series of Cooperative Agreements between the NPS and the Trust Board have served as the mechanism for transferring federal funding to the Trust Board for its operations in the Reserve. The first Cooperative Agreement was signed in 1988, and had no sunset date. Subsequent agreements have been renewable for five year terms. (2000-2005, 2005-2010, 2010-2015, 2015-2020).

The State of the Reserve

The Trust Board carries out its role consistent with the values that led to the Reserve's founding 40 years ago. The success of this model and the effectiveness of its programs have led to the widespread adoption of historic preservation values by all of its partners: private property owners, the Town of Coupeville, Island County, Washington State Parks and the NPS. Congress' intent, which was to develop an innovative approach to preservation in which local citizens and government assume leadership entities has proven effective, both in terms of economic efficiency and local pride and support for the preservation of the Reserve's historic properties and its rural cultural landscape.

Current Status: Strengths

- The Reserve and Central Whidbey Island enjoy overwhelming public support—locally, regionally and nationally.
- The Reserve contributes to the blend of a working farming community, a vibrant tourism destination, and outstanding standard of living amenities for its residents.
- Support for the Trust Board model of cooperation and the mission of historic preservation is very strong.
- The “Friends of Ebey’s” 501(c)3 non-profit organization is an important partner to the Trust Board. The Friends have been remarkably successful in providing support for Trust Board staff, programs, a very popular historic rehabilitation grant program, and more.
- The Reserve attracts and retains dedicated volunteers, such as the Jacob and Sarah Ebey House docents, who give significant time and talent to the Reserve.

Nevertheless, the Reserve and its Trust Board face serious challenges that threaten organizational viability and fidelity to the Reserve’s founding concepts.

Current Status: Challenges

- The effectiveness of the Reserve model, and the work of the Trust Board, has been hampered by over-dependence on Federal budget processes and shifting priorities and policies within the NPS.
- The Trust Board has outgrown its business model, which places heavy emphasis on one funding source.
- The Trust Board is currently understaffed and handicapped in its ability to fulfill its basic functions in areas of administration, preservation, and interpretation.
- Visitation at the Reserve has increased dramatically without increased capacity, leading to visitor impacts and management issues that threaten historic resources.

Planning Process and Outcome

Although the Trust Board has maintained annual planning to produce its budget and work plan, it has not engaged in comprehensive strategic planning in several years. The current planning process was undertaken at the direction of the Trust Board in order to identify bigger picture priority issues facing the Reserve and the Trust Board. The objective was to create a systematic road map to guide the Board and staff for a period of approximately five years.



The planning process adopted by the Board and staff emphasized economy and clarity in facing important structural issues and emergent external pressures on the Reserve and its staff. The Trust Board identified its core mission, functions, opportunities and challenges in a series of three single-focus workshops, each held as an open, advertised public meeting. Ideas generated in the workshops were organized and synthesized by staff into a draft plan structure that was presented to the Trust Board for review, comment and adoption.

The main functions of the Trust Board were framed as four distinct Strategic Elements, each representing a concise Value Proposition with sub-components (work areas) that should help develop future work plans. Throughout the planning process, three key concerns repeatedly emerged from discussions and are reflected in the “Five Year Program Map” that follows:

Capacity: In the past five years, Trust Board staff has fluctuated according to available funding. While the number of staff has ranged from two to four employees (with additional minimal seasonal assistance), this plan’s estimate of staff needed to meet the responsibilities outlined in this plan is 5.25 FTE – or 2.25 more FTE than current staffing levels (three employees). If the Trust Board is to be effective in meeting even basic responsibilities in all four Strategic Elements, additional staff, or new strategies to accomplish work goals, will be necessary.

Need for Review: It cannot be stressed enough that the future effectiveness of the Trust Board in any of the Strategic Elements of this plan depends upon a long needed formal review of partner roles and functions, and analysis of the Reserve’s existing business model. All partners should work together to ensure that this essential objective is met in the coming year. Review of the NPS agreement is especially urgent, given the expiration of the joint NPS-Trust Board Cooperative Agreement in 2020, and the financial role of the NPS outlined in the Interlocal Agreement.

Partner Support: The Trust Board serves the Reserve and community through partnerships. The Trust Board represents the common interests of all four key partners in the Reserve. It can only succeed with strong direction and the support of its partners.

Five Year Program Map

Strategic Element 1—Preservation

Value Proposition—Trust Board will fulfill its preservation mandate according to the enabling legislation, the Central Whidbey Island Historic District, the Ebey’s Reserve Design Guidelines, and other laws, policies and agreements that are relevant to Ebey’s Landing National Historical Reserve. (Estimated 1.5 FTE between staff and intern)

Program Components

- 1.1 Design Review—Collaborate with Town of Coupeville and Island County planning departments in, implementing and enforcing local zoning regulations through the design review process.

Ongoing
.25 FTE

- 1.2 Easements—Review and monitor preservation easements.

Ongoing
.25 FTE

- 1.3 Technical Assistance—Coordinate public workshops; provide expert consultation with property owners, collaborate with the National Park Service on projects on park properties.

Ongoing
.25 FTE

- 1.4 Preservation Grants—Administer Ebey’s Forever and other grant programs

Ongoing
.25 FTE

- 1.5 Planning, legislation and Environmental Review – Where appropriate, provide comment and consultation for SEPA, NEPA, NHPA Section 106 and other review processes; collaborate with other historical and preservation interested parties; and advise the public and partners on impacts and adverse effects to the Reserve.

Ongoing
.5 FTE

Strategic Element 2—Interpretation, Education and Outreach

Value Proposition: Trust Board will engage with the community, visitors and media audiences to maintain an informed and inspired constituency. (Estimated 1.25 FTE)

Program Components

2.1 Interpretation—Coordinate interpretive and sign planning, content creation, production and installation, maintenance.

Ongoing
.25 FTE

2.2 Volunteer Coordination—Recruit, train, and schedule volunteers and coordinate retention incentives and volunteer recognition events.

Ongoing
.25 FTE

2.3 Community Outreach—Develop prioritized outreach plan to engage residents, property owners, businesses and other local organizations in Reserve activities; coordinate or sponsor community tours and events and inspire a historic preservation ethic in the community.

Ongoing
.25 FTE

2.4 Visitor Services—Monitor visitation trends and impacts and coordinate with Washington State Parks and NPS on resource protection, visitor amenities and visitor facility maintenance.

Ongoing
.25 FTE

2.5 Media—Assist local, regional and national outlets in telling the Ebey’s story and maintain web and social media presence through websites and other appropriate channels.

Ongoing
.25 FTE

Strategic Element 3—Partnerships and Sustainability

Value Proposition: Trust Board will ensure sustainability of ELNHR vision by fostering equitable and effective partnerships (1 FTE staff)

Program Components

- 3.1 Partnership Agreement Review—Conduct a formal review of existing foundational documents and agreements with NPS, Town of Coupeville, Island County and Washington State Parks. Update working relationships based on changing conditions, resource availability and emergent issues.

FY 2020
.25 FTE

- 3.2 Friends of Ebey’s —Collaborate in planning and foster a mutually supportive relationship with Friends of Ebey’s.

Ongoing
.25 FTE

- 3.3 Partnerships of Opportunity—Seek out new and energize existing collaboration partners.

Ongoing
.25 FTE

- 3.4 Business Model Assessment—Review program capacity and financial structure (fee for service/cooperative agreement/grants/cost reimbursement etc.)

FY 2020 Review work
.25 FTE

Strategic Element 4—Operations and Administration

Value Proposition: Trust Board and staff will operate for efficiency, effectiveness, and accountability (1.5 FTE; staff, Trust Board members)

Program Components

- 4.1 Staffing—Support optimal staffing levels with direct staff, contractors, interns, and volunteers. Develop qualifications and position descriptions. Maintain work plans, supervise assignments and outcomes. Recruit and train quality personnel and compensate fairly and equitably, based on merit.

Ongoing
.15 FTE

- 4.2 Operations Infrastructure—Maintain operational capacity with adequate office space and support for utilities, vehicles and Information Technology.

Ongoing
.10 FTE

- 4.3 Financial Management—Maintain financial accounts, perform required audits and produce reports as required by contracts and agreements.

Ongoing
.25 FTE

- 4.4 Management Controls—Maintain up-to-date office and personnel policies, utilize best management practices and strive for accountability, efficiency and effectiveness.

Ongoing
.25 FTE

- 4.5 Trust Board Governance—Ensure clear and effective staff-board relationships, open and effective business meetings, well-defined Board policies, transparency and accountability in budget oversight and develop clear and realistic Board work plans.

Ongoing
.50 FTE

- 4.6 External Affairs—Develop and maintain strong intergovernmental relations and respond to information needs of stakeholders, elected officials and partner organizations.

Ongoing
.25 FTE

Participants:

Trust Board Participants:

- Lisa Bernhart (Chair) – Town of Coupeville
 - Wilbur Bishop (Secretary) – Island County
 - Fran Einterz – Island County
 - Sally Garratt (Vice-Chair) – Island County
 - Chris Holm – Washington State Parks
 - David Louter – National Park Service
 - Mike Moore – Town of Coupeville
 - Al Sherman (Treasurer) – Island County
- (note: 1 County board position was vacant during planning)

Other Participants:

- Kristen Griffin – Trust Board Reserve Manager
- Carol Castellano – Trust Board Office Manager
- Molly Hughes – Mayor, Town of Coupeville
- Helen Price Johnson – Island County Commissioner, District 1
- Alix Roos – Executive Director, Friends of Ebey’s
- Robert Steelquist, Facilitator
- Roy Zipp – Ebey’s Reserve Operations Manager (National Park Service)



Appended:

- Outcomes and Timeline Spreadsheet
- Key organic documents
- Map