State of the Park Report for Saugus Iron Works National Historical Site

Scoping Workshop and Report Development Documentation

July 24-26, 2012

1. Introduction

This document provides background information and methods used to develop the 2012 State of the Park report for Saugus Iron Works National Historical Site, including a summary of the scoping workshop process, the list of participants involved in the scoping workshop and the assessments of resource condition, and notes to document why certain decisions or assessments were made.

A State of the Park report will be developed for each park to "assess the overall status of park resources and use this information to improve park priority setting and communicate complex park condition information to the public in a clear and simple way" (NPS Call to Action Plan). The report is a truthful assessment of the overall condition of priority park resources and values, irrespective of the ability of the park superintendent or the National Park Service to influence it. The purpose of each report is to:

- Provide a snapshot of the status and trend in the condition of priority park resources and values to visitors and the American public.
- Summarize and communicate complex information using non-technical language and a visual format.
- Highlight park stewardship activities and accomplishments to maintain or improve the State of the Park.
- Identify key issues and challenges facing the park to help inform management planning.

State of the Park reports bring a standardized approach to assessing the condition of priority resources and values for a park, and for communicating the condition summaries. The reports focus on the priority resources and values of the park based on the park's purpose and significance, as described in the park's Foundation Document or General Management Plan. The assessments of resource condition are based upon the best available scientific and scholarly research, reports, and publications, which are cited and linked to throughout the report and the associated "drill-down website version" of the report, but the condition assessments also involve expert opinion and the professional judgment of park staff and the subject matter experts involved in developing the report. The in-depth knowledge by park staff of park resources and recent events and activities, plus their expertise from being involved in the day-to-day practice of all aspects of park stewardship, are reflected throughout this report.

The status and trends in the condition of priority park resources and values are continually changing, and this State of the Park Report will require updating as new data and understanding for the resources becomes available. A full revision of the report is expected every five years; however, incremental updates may be made periodically between major revisions.

2. Approach and Methodology

2.1 Definition of Key Terms

- **Fundamental and Other Important Resources and Values**: Fundamental resources and values are the particular systems, processes, experiences, scenery, sounds, and other features that are key to achieving the park's purposes and maintaining its significance. Other important resources and values are those attributes that are determined to be particularly important to park management and planning, although they are not central to the park's purpose and significance. These priority resources are identified in the Park Foundation Document and/or General Management Plan. The short-cut name that will be used for this will be **Priority Resources**.

- **Desired Conditions**: A qualitative description of the integrity and character for a set of resources and values, including visitor experiences, that park management has committed to achieve and maintain. These Desired Conditions are tied to the Park Foundation Document and/or General Management Plan.

- **Indicator of Condition**: A selected subset of components or elements of a Priority Resource (i.e., a Fundamental or Other Important Resource or Value for the park) that are particularly "information rich" and that represent or "indicate" the overall condition of the Priority Resource. There may be one or several indicators of condition for a particular Priority Resource.

- **Specific Measure of Condition**: One or more specific measurements used to quantify or qualitatively evaluate the condition of an Indicator at a particular place and time. There may be one or more Specific Measures of Condition for each Indicator of Condition.

- **Current Condition**: The current quantifiable or otherwise objective value or range of values for an Indicator or Specific Measure of Condition based on scientific data or scholarly analysis.

2.2 Symbols Used to Communicate State and Trend in Resource Condition

The Status and Trend symbols used throughout the State of the Park report are summarized in the following key. The background color (Green, Yellow, or Red) represents the current condition of a resource, the direction of the arrow summarizes the trend in condition, and the thickness of the outside line represents the degree of confidence in the assessment of condition based on available data and understanding. In some cases, the trend arrow is omitted because trend is unknown (e.g., data from a one-time inventory or only one year of monitoring data) or not applicable.

Condition Status		Trend in Condition		Confidence in Assessment	
	Warrants Significant Concern		Condition is Improving		High
	Warrants Moderate Concern		Condition is Unchanging		Medium
	Resource is in Good Condition		Condition is Deteriorating		Low

Examples of how the symbols should be interpreted:

Resource is in good condition, its condition is improving, high confidence in the assessment.

Condition of resource warrants moderate concern; condition is unchanging; medium confidence in the assessment.

Condition of resource warrants significant concern; trend in condition is unknown or not applicable; low confidence in the assessment.

2.3 Rules for Combining Multiple Status and Trend Symbols

The overall assessment of the condition for a Priority Resource or Value may be based on a combination of the status and trend of multiple indicators and specific measures of condition. A set of rules are proposed for summarizing the overall Status of a particular Priority Resource based on assessments of Status for two or more specific measures of condition, and for summarizing the overall Trend for the resource based on multiple Trend arrows. The proposed set of rules, based on an approach used by Parks Canada Agency to develop State of the Park reports, is as follows:

Condition:
To determine the combined condition, each red symbol is assigned zero points, each yellow symbol is assigned 50 points, and each green symbol 100 points. Calculate the average, and apply the scale below to determine the resulting color.

Score 0 to 33	Score 34 to 66	Score 67 to 100
Red	Yellow	Green

Trend:
To determine the overall trend, subtract the total number of down arrows from the total number of up arrows. If the result is 3 or greater, the overall trend is up. If the result is -3 or lower, the overall trend is down. If the result is between 2 and -2, the overall trend is unchanged.

3. Scoping Workshop Agenda and Participants

The Saugus Iron Works National Historical Site State of the Park workshop was held at park headquarters at Salem, Massachusetts on July 24-26, 2012. See Appendix 1 for the workshop agenda.

3.1 Participants in Development of the State of the Park Report

Name	Title	e-mail address
Michael Quijano-West	Superintendent, SAMA and SAIR	michael_quijano-west@nps.gov
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4. Notes/Comments about Decisions Made in Selecting the List of Priority Resources and Values, Indicators of Condition, and Specific Measures of Condition and Assessing the Condition of Priority Resources

The internet version of the park's State of the Park report, available at http://www.nps.gov/stateoftheparks/sair/, provides detailed information and sources of information for the resources summarized in the report, including references, accounts on the origin and quality of the data, and the methods and analytical approaches used in the assessments. The intent of the "drill-down website version" is to allow the reader to access the large amount of complex scientific and scholarly data and information upon which the assessments of condition are based. There will be some situations in which it may not be clear how the assessments were made based on the underlying "evidence" available through the website version plus the professional expertise of the participants. The information and notes in the table below are intended to assist the readers and reviewers of the report in understanding why certain decisions were made as part of summarizing a large amount of complex data and information professional judgment for the purposes of communicating the information to visitors and the public.

4.1 Notes/Comments about the List of Priority Resources Used in the Report

Priority Resource or Value	Notes/Comments

4.2 Park Infrastructure Section

Report Component	Notes/Comments
Facility Condition Index (FCI)	Facility condition data extracted from NPS Facility Management Software System (FMSS): Deferred Maintenance (DM) and Current Replacement Value (CRV) are summed by Asset Category for all assets with "Operating", "Oper/Obso", or "Inactive" Status. Each Asset Category's FCI is calculated by dividing its subtotaled DM by its subtotaled CRV. The park's Overall FCI is calculated by dividing its total DM by its total CRV. A lower FCI indicates a better condition. To achieve standardization between 2006 and 2011, 2006 CRV is multiplied by (1.7774 ÷ 1.45), resulting in 2006 Adjusted CRV.
FCI Condition Status	Good condition rating: FCI ≤ 0.100 Fair condition rating: FCI = 0.101 to 0.150 Poor condition rating: FCI = 0.151 to 0.500 Serious condition rating: FCI > 0.500
FCI Condition Trend	Based on calculated percentage change in FCI: (2011 FCI - 2006 FCI) ÷ 2006 FCI. Up Arrow: FCI improved by > 10% over the 5 years Unchanged: FCI is within plus or minus 10%, 2011 vs. 2006 Down Arrow: FCI degraded by > 10% over the 5 years
API/FCI Scatter Plot	Retrieved from AMRS. For more information, refer to: http://www.nps.gov/stateoftheparks/assets/docs/Park_Facility_Management_Terminology_and_Concepts.pdf
Energy Usage	Energy consumption data were downloaded for FY 2006 and FY 2011 from the NPS Energy Management Database and Reporting System. Building gross square footage data were also obtained from the Energy Management database.

4.3 Other Notes or Comments

Appendix 1. Workshop Agenda

AGENDA

State of the Park Report and RSS-Lite Scoping Workshop

Salem Maritime NHS and Saugus Iron Works NHS

2nd Floor Conference Room, St. Joseph Bldg. on Derby Street, Salem, MA

Purpose of this workshop:

Develop a State of the Park report for Salem Maritime NHS and one for Saugus Iron Works NHS, and complete the initial steps in developing a streamlined version of a Resource Stewardship Strategy for each of the two parks. The State of the Park report and RSS-lite for each park will summarize the status and trend in the condition of the fundamental and other important resources and values (priority resources) for each park, which tie back to each park's Purpose and Significance. There will be a follow-up workshop to develop comprehensive strategies and specific projects as part of the "RSS Lite" to discuss how to advance resources from existing conditions to "where we want to be". Develop a model process that can be used for other parks in the Northeast Region for coordinating the development of a park Foundation Document, State of the Park report, and RSS-Lite.

Tuesday, July 24, 2012

8:30am - Morning Session

- Welcome and introductions – Michael Quijano-West
- Overview: What we are Doing and Why – Steve Fancy, Bob Page, Allen Cooper

    - Coordination of the State of the Park report and RSS-Lite based on indicators and measures of resource condition that tie back to the draft Fundamental and Other Important Resources and Values that will be developed on the first day of the workshop.
    - Describe products of the workshop.
- Initial steps in developing a Foundation Document for each park – Allen Cooper
    - What is the Purpose and Significance of Salem Maritime NHS and Saugus Iron Works NHS?
    - What are the Fundamental and Other Important Resources and Values for each park?
    - Initial discussion with all participants. Instructions to breakout groups. Divide into breakout groups.

11:30 -12:30pm - Lunch Break

12:30pm - Afternoon Session

- Breakout groups for each park: Purpose, Significance, and FOIRVs for each park
- Break (mid-afternoon)
- Reconvene larger group.
    - Review the day's progress and initial list of FOIRVs.
    - Overview of plans for Wednesday and Thursday

5:00 – End of First Day

<u>Wednesday, July 25, 2012</u>

8:30am - Morning Session

- Review Progress from Tuesday and plans for remainder of workshop – Steve Fancy
    - Discuss and agree on list of priority resources to use for SotP report and RSS purposes
    - Work through two examples to demonstrate how to use indicators and specific measures of condition to summarize the status and trend in the condition of a priority resource.
    - Reference Conditions 101 – explain what reference conditions are and provide examples
- Instructions to breakout groups.
- Break into four work groups (natural resources, cultural resources, visitor experience, park infrastructure). Each workgroup begins to fill in the State of the Park tables for each of the parks.
    - For each priority resource or value, determine the indicators and specific measures of condition the park wants to use for the RSS and SotP report.
    - Initial impressions of status and trend for each priority resource (green, yellow, red) based on the indicators and measures; document existing data sources for follow-up purposes.
    - Discuss initial reference condition/target value or range for each indicator and measure for context.
    - Document the scientific/scholarly rationale and source for each indicator, specific measure and reference condition/ target value.

11:30 -12:30pm - Lunch Break

12:30pm - Afternoon Session

- Continue working in breakout groups.
- At an appropriate time, reconvene larger group to review progress and conduct brainstorming session:
    - For each park, what are some of the actions and activities the park is doing to maintain and improve resource condition for priority resources?
    - What is the biggest success story at each park in the past five years?
    - Initial ideas for "Resources Briefs" to highlight in report, and who will take the lead on each?

- Break back out into smaller workgroups to continue work on State of the Park tables.

4:30pm – Reconvene larger group. Review day's progress and plans for Thursday

<u>Thursday, July 26, 2012</u>

8:30am - Morning Session

- Review Progress from Wednesday and plans for remainder of workshop – Steve Fancy

- Break back out into smaller workgroups to continue work on State of the Park tables and reference conditions. Some people work independently to summarize data, track down various documents and datasets, and begin writing Resource Briefs and content for Chapters 3 and 4 of the reports.

11:30 -12:30pm - Lunch Break

12:30pm - Afternoon Session

- Continue working in breakout groups or individually to fill in tables and write sections of the reports.

3:30 – 5:00pm – Close-out Session with all participants.

- Review progress from the workshop and group discussion. How did we do?
- Discuss plans for follow-up workshop to develop strategies and projects as part of RSS Lite.
- Next steps: action items and who will take the lead on following up on each of the sections
- Final comments and close-out – Michael Quijano-West