

Chesapeake Bay Program Biennial Strategy Review System

The Chesapeake Bay Program's Biennial Strategy Review System (SRS) is the adaptive management-based review process by which the Partnership seeks to meet the following *Chesapeake Bay Watershed Agreement* commitment:

Goal Implementation Teams will re-evaluate biennially and update strategies as necessary, with attention to changing environmental and economic conditions. Partners may identify policy changes to address these conditions and minimize obstacles to achieve the Outcomes.

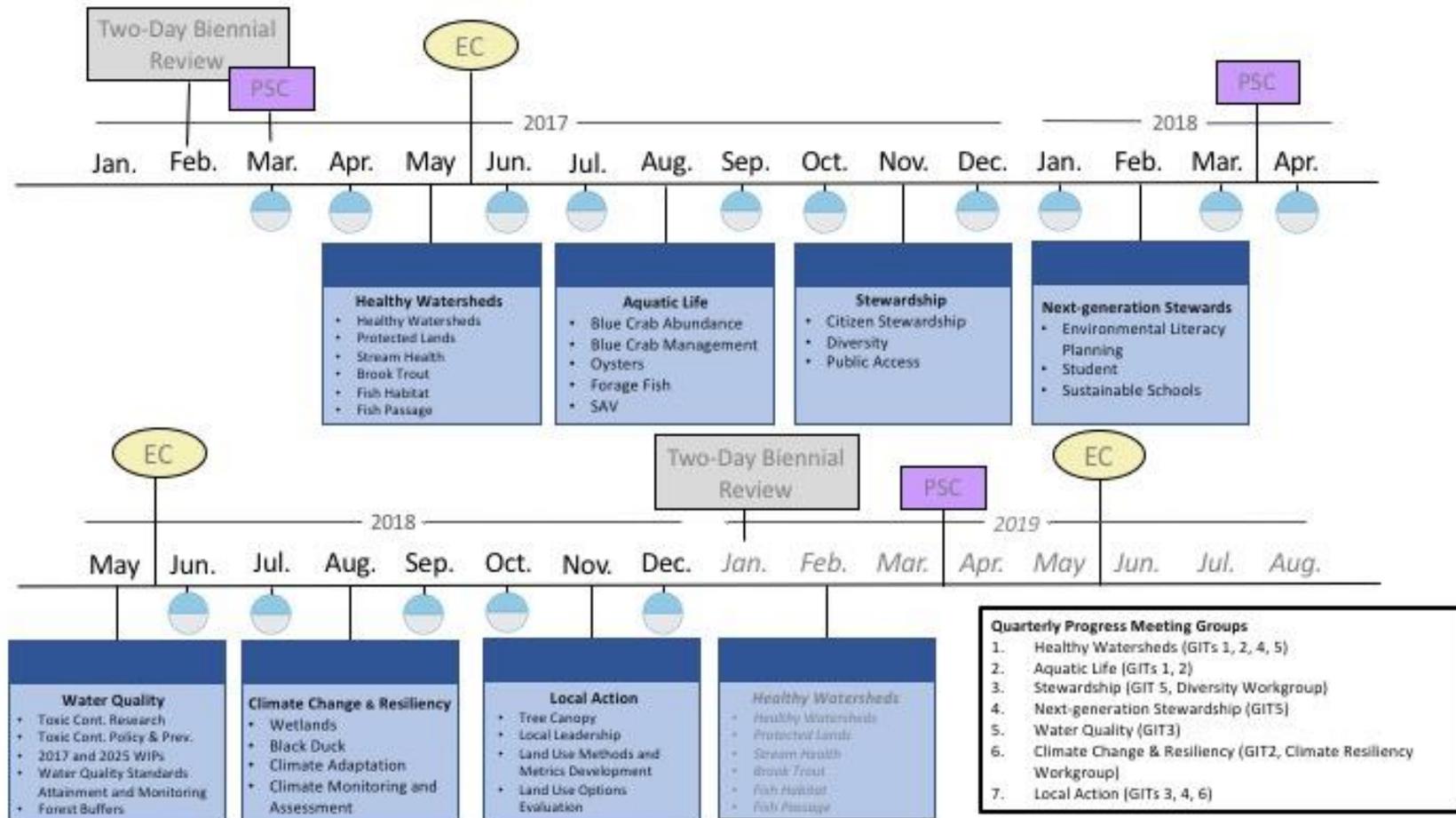
The SRS is a two-year process meant to improve our effectiveness in achieving our Goals and Outcomes. During this process, the Partnership will review its progress toward the *Chesapeake Bay Watershed Agreement*; identify the management approaches and actions that are or are not working; consider scientific, fiscal, and policy developments; adjust our Management Strategies and Two-Year Work Plans as appropriate; and develop the next set of Two-Year Work Plans. The system is not intended to focus on where we are falling short, but on how we can work together and support each other to improve our collective success.

The SRS begins with a Two-Day Biennial Review Meeting designed to provide: (1) a broad review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the previous two years, and (2) an identification of issues and developments in the scientific, fiscal, and policy fields that have or could impact Goal and Outcome achievement. Issues identified at the Two-Day Biennial Review Meeting will inform subsequent and more detailed Quarterly Progress Meetings: meetings of the Management Board during which progress toward individual Outcomes is reviewed, necessary changes to management approaches and/or actions are identified, and, where appropriate, input to support revisions to Management Strategies and Two-Year Work Plans is offered. Revised Management Strategies and/or Two-Year Work Plans discussed at one Quarterly Progress Meeting will be reviewed and accepted by the Management Board at the subsequent Quarterly Progress Meeting. Each Outcome will receive individual attention from the Management Board during this review process, which will be repeated every two years.

Much of the work that supports the SRS will be conducted by the Management Board and Goal Implementation Teams (GITs) during the Quarterly Progress Meetings. However, the SRS is not intended to exclude other groups. To the contrary, it is intended to be an inclusive process open to all. In particular, the flow of information that will occur between the Management Board and the Principals' Staff Committee (PSC) throughout this process will need to be a two-way street. Results and actions from the Two-Day Biennial Review Meeting and Quarterly Progress Meetings will be regularly provided to the PSC, and resulting input and feedback from the PSC will be shared with the Management Board, GITs, and other groups as appropriate.

The remainder of this document includes descriptions of the critical components of the SRS. It is important to view this information as a work in progress. The current version of the SRS is the result of many conversations with many partners over many months, all of whom have devoted much time and effort to making it work. While what follows is not perfect, our goal was not to design a perfect process, but to design a process that was good enough to get started—and we have done that. We pledge to improve this process as we move forward.

2017-2018 Biennial Strategy Review System Schedule



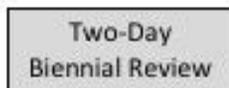
2017-2018 Biennial Strategy Review System Schedule Legend



Quarterly Progress Meetings: Meetings of the Management Board during which progress toward individual Outcomes is reviewed, necessary changes to management approaches and/or actions are identified, and, where appropriate, input is offered to support Two-Year Work Plan revisions.



Interim Management Board Meetings: Regular meetings of the Management Board. High-priority issues—whether newly identified or previously identified during a Quarterly Progress Meeting—should be addressed here, as needed.



Two-Day Biennial Review Meeting: A high-level retrospective review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the previous two years and an identification of issues and developments in the scientific, fiscal, and policy fields that could impact Goal and Outcome achievement.



Principals' Staff Committee Meeting: Regular meetings of the Principals' Staff Committee during which members can provide their input on significant changes or shifts in strategy and use the results of the Biennial Strategy Review System to prepare a report on implementation progress for the Executive Council.



Executive Council Meeting: Regular meetings of the Executive Council during which members can offer concurrence and partner commitment to significant changes or strategy shifts, as needed.

Two-Day Biennial Review Meetings

Purpose: To identify issues and developments in the scientific, fiscal, and policy fields, and in the implementation of our management approaches, that the Chesapeake Bay Program should consider in adaptively managing its work over the next two years. This high-level review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* will improve our effectiveness in meeting our Goals and Outcomes. This meeting will be led by the Management Board (MB) and will directly support the needs of the Principals' Staff Committee's (PSC), as articulated in the *Chesapeake Bay Watershed Agreement*.

When: A two-day meeting held at the beginning of each biennial review cycle.

Who: An open meeting with emphasis on attendance by the Management Board, Outcome Leads (often Goal Implementation Team or Workgroup Leads), Advisory Committee Chairs, and the Scientific, Technical Assessment & Reporting (STAR) Team.

Guiding Questions:

1. *In general*, are we successfully implementing our Management Strategies and Two-Year Work Plans at a pace that is reasonably likely to achieve our Outcomes? Where are we succeeding? Where are we falling short?
 2. Have external, influencing factors (e.g., scientific understanding or technological developments; fiscal resources or finance options; or legal, regulatory, or policy boundaries) sufficiently changed to warrant revisions to our Management Strategies and/or Two-Year Work Plans?
 3. Have external program evaluations or reviews identified Partnership action(s) that are needed to foster progress toward our Outcomes?
 4. What opportunities or obstacles exist to improve or hinder cross-Outcome collaboration or yield cross-Outcome benefits?
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Objectives:

1. Identify lessons learned from a broad retrospective review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the past two years.
 2. Identify observed and anticipated issues and developments in the scientific, fiscal, and policy fields that the Management Board and Goal Implementation Teams should consider in fostering progress toward and/or modifying our Management Strategies and Two-Year Work Plans over the next two years.
 3. Use the results of external program evaluations or reviews to identify Partnership actions that would foster progress toward our Outcomes.
 4. Facilitate the implementation of cross-team activities that will accelerate progress toward or otherwise benefit multiple Outcomes.
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Outputs:

1. A shared understanding of (a) effective management approaches and/or actions that should be replicated, (b) ineffective management approaches and/or actions that should be avoided, and (c) ideas and innovations that should be incorporated into management approaches and/or actions.
2. Recommendations of scientific and technical, fiscal, and policy developments that the Management Board and Goal Implementation Teams should consider in their review of assumptions around the factors influencing our progress and the prioritization thereof, and in their modification of Management Strategies and/or Two-Year Work Plans, as appropriate.
3. Recommendations of changes to resource allocations.
4. Recommendations to guide program evaluations or reviews.
5. Recommendations of topics that warrant further discussion at Quarterly Progress Meetings.
6. Information to guide the completion of the “State of the Program Report” the PSC will submit to the Executive Council.

Process: The first Two-Day Biennial Review Meeting occurred on Wednesday and Thursday, February 8 and 9, 2017, in Cambridge, Maryland. This meeting differed from subsequent Two-Day Biennial Review Meetings (to take place in 2019, 2021, etc.), in the respect that previous Quarterly Progress Meetings had not taken place, the results of which would have otherwise informed our understanding of what has and has not worked in the implementation of our efforts to achieve the *Chesapeake Bay Watershed Agreement*. Future Two-Day Biennial Review Meetings will provide a greater opportunity to explore lessons learned.

Quarterly Progress Meetings

Purpose: To improve our success in achieving individual *Chesapeake Bay Watershed Agreement* commitments through (1) the review of progress toward individual Outcomes, (2) the application of opportunities and insights identified during the preceding Two-Day Biennial Review Meeting or elsewhere, and (3) the resulting implementation of necessary changes to our Management Strategies and/or Two-Year Work Plans.

The discussions and decisions that arise from each Quarterly Progress Meeting will inform whether Goal Implementation Teams (GITs) need to draft and seek approval of new Management Strategies and/or Two-Year Work Plans. At each Quarterly Progress Meeting, GITs and Workgroups will provide information and request action, support, or assistance from the Management Board; the requested feedback or appropriate action items will be provided at the subsequent Management Board meeting. As a result, Outcomes will no longer be on one two-year revision cycle. Instead, cohorts of Outcomes—identified in the Biennial Strategy Review System Schedule—will be on their own two-year revision cycle, with the beginning of this cycle marked by a cohort’s recurring Quarterly Progress Meeting and the Management Board meeting that follows.

When: Quarterly and subsequent monthly meetings of the Management Board.

Who: The Management Board, Outcome Leads (often Goal Implementation Team or Workgroup Leads), Advisory Committee Chairs, and invited outside experts.

Objectives:

1. Assess the implementation of our Management Strategies and Two-Year Work Plans. Are we doing what we said we would do? Are our actions having the desired effect?
 2. Acknowledge our assumptions and update our understanding of the system. What’s working? What’s not working? What new developments have occurred since our work began?
 3. Identify necessary adjustments to our work. What revisions to our Management Strategies and Two-Year Work Plans are warranted according to current assessments?
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Inputs and Outputs: See the Quarterly Progress Meeting Guide for more information on how to prepare for this meeting and on what we expect to come out of it.

Process:

Timeframe	Activity
Before the Quarterly Progress Meeting	

5 weeks before Quarterly Progress Meeting	The SRS Planning Team (which is part of GIT 6) meets with the GITs and/or Workgroups in a Quarterly Progress Meeting Cohort to address issues and answer questions.
3 weeks before Quarterly Progress Meeting	Outcome Leads submit draft meeting materials to the SRS Planning Team. GIT 6 will provide feedback on these materials in advance of the Outcome Leads' meeting with STAR. These materials include: <ol style="list-style-type: none"> 1) Logic table 2) Answers to discussion questions found in Quarterly Progress Meeting Guide 3) PowerPoint presentation
2 weeks before Quarterly Progress Meeting	Outcome Leads present "dry runs" of their presentations at a STAR meeting (with members of the SRS Planning Team in attendance) for review and feedback. The SRS Planning Team should work with Outcome Leads to refine similar asks of the Management Board into shared asks, where appropriate.
	Based on the meeting materials submitted by the Outcome Leads, the discussion at the STAR meeting, and any subsequent meeting material refinement, the SRS Planning Team prepares a "Consolidated Requests" document that presents all asks of the Management Board in a single document and highlights the shared requests that have come from multiple Outcome Leads.
	The Management Board Coordinator or Staffer sends the following materials to the Management Board: <ol style="list-style-type: none"> 1) Logic Tables 2) Answers to discussion questions found in Quarterly Progress Meeting Guide 3) PowerPoint presentations 4) Consolidated Requests document
During the Quarterly Progress Meeting	
During Quarterly Progress Meeting	<p><u>GIT or Workgroup</u> Chair provides a brief introduction to the Management Board of the presenting subject matter expert.</p> <p>After each presentation, Management Board and GIT 6 Chairs lead a discussion based on the following four questions, which are described in greater detail in the Quarterly Progress Meeting Guide:</p> <ul style="list-style-type: none"> • What are our assumptions? • Are we doing what we said we would do? • Are our actions having the expected effect? • How should we adapt?
After the Quarterly Progress Meeting	
3 days after Quarterly Progress Meeting	The SRS Planning Team holds a debrief with the GITs and/or Workgroups in a Quarterly Progress Meeting Cohort.
2 weeks after Quarterly Progress Meeting	Using the Consolidated Requests document, GIT 6 further refines GIT requests and recommended actions where appropriate.
4 weeks before next Management Board meeting	Management Board Coordinator or Staffer sends the following materials to the Management Board: <ol style="list-style-type: none"> 1) Decisions made at the Quarterly Progress Meeting 2) Refined Consolidated Requests document

Next Management Board Meeting	
<i>Follow up to requests and recommended actions presented at previous Quarterly Progress Meeting</i>	
2 weeks after “Next Management Board” meeting	Management Board Coordinator or Staffer sends the Management Board and the GITs and Workgroups in the Quarterly Progress Meeting Cohort a final summary of all decisions made at the two meetings.
90 days after “Next Management Board” meeting	GITs submit revised Management Strategies and Two-Year Work Plans (if appropriate) based on decisions made.

Updating Management Strategies and Two-Year Work Plans:

- Management Strategies: If it is determined during a Quarterly Progress Meeting that (a) new factors influencing the Partnership’s progress toward an Outcome should be considered or (b) management approaches should be discarded, modified, or added, changes to an Outcome’s Management Strategy may be necessary. GITs should not focusing on editing the entire document, but should instead focus on editing the following sections with the following information:
 - Participating Partners: Have previously unidentified agencies or organizations committed to your management approaches or actions?
 - Factors Influencing Success: Have you identified new factors influencing the Partnership’s progress toward an Outcome? Do previously identified factors no longer impact your work?
 - Current Efforts and Gaps: Have previously identified management efforts that support progress toward an Outcome—taking place within or outside of the Partnership—been modified or stopped? Have previously identified gaps been addressed?
 - Management Approaches: Have the management approaches that seek to address the factors identified above changed? Are new approaches required?
 - Monitoring Progress: Edit this section if you have added new approaches to this Management Strategy or if your monitoring methods have changed.
 - Assessing Progress: Edit this section if you have added new approaches to this Management Strategy or if your assessment methods have changed.
 - Adaptively Managing: Edit this section as needed.
- Two-Year Work Plans: If it is determined during a Quarterly Progress Meeting that (a) new factors influencing the Partnership’s progress toward an Outcome should be considered or (b) actions that support management approaches should be discarded, modified, or added, changes to an Outcome’s Two-Year Work Plan may be necessary. The Two-Year Work Plan should follow the Logic Table format.

Note: Each of the *Chesapeake Bay Watershed Agreement* Outcomes will be reviewed and discussed at one Quarterly Progress Meeting during the two-year Biennial Strategy Review System schedule. However, if high-priority issues arise, Outcome Leads should be sure to bring these items to the immediate attention of the Management Board (rather than waiting until their next scheduled Quarterly Progress Meeting).