

Biennial Strategy Review System: Logic Table and Work Plan

Instructions: The following Logic Table should be used to articulate, document, and examine the reasoning behind your work toward an Outcome. Your reasoning—or logic—should be based on the Partnership’s adaptive management [decision framework](#). This table allows you to indicate the status of your management actions and denote which actions have or will play the biggest role in making progress.

Some Management Strategies and Work Plans will not immediately or easily fit into this analytical format. However, **all GITs should complete columns one through four** to bring consistency to and heighten the utility of these guiding documents. The remaining columns are recommended for those who are able to complete them. If you have any questions as you are completing this table, please contact SRS Team Representative and Indicators Coordinator Laura Free (free.laura@epa.gov).

The instructions below should be used to complete the table. An example table is available on the [GIT 6 webpage](#) under “Projects and Resources”.

1. For the first round of strategic review (2017-2018): Use your existing Work Plan actions to complete the **Work Plan Actions** section first. Make sure to number each of the actions under a high-level Management Approach, as these numbers will provide a link between the work plan and the logic table above it. Use color to indicate the status of your actions: a **green** row indicates an action has been completed or is moving forward as planned; a **yellow** row indicates an action has encountered minor obstacles; and a **red** row indicates an action has not been taken or has encountered a serious barrier.
2. **Required:** In the column labeled **Factor**, list the significant factors (both positive and negative) that will or could affect your progress toward an Outcome. The most effective method to ensure logic flow is to list all your factors and then complete each row for each factor. Consult our Guide to Influencing Factors (Appendix B of the Quarterly Progress Meeting Guide) to ensure your list is reasonably comprehensive and has considered human and natural systems. Include any factors that were not mentioned in your original Management Strategy or Work Plan but should be addressed in any revised course of action. If an unmanageable factor significantly impacts your outcome (e.g., climate change), you might choose to list it here and describe how you are tracking (but not managing) that factor.
3. **Required:** In the column labeled **Current Efforts**, use keywords to describe existing programs or current efforts that other organizations are taking that happen to support your work to manage an influencing factor but would take place even without the influence or coordination of the Chesapeake Bay Program. You may also include current efforts by the Chesapeake Bay Program. Many of these current efforts may already be identified in your Management Strategy; you may choose to link the keywords used in this table to your Management Strategy document for additional context. You may also choose to include some of these efforts as actions in your work plan; if you do, please include the action’s number and hyperlink.
4. **Required:** In the column labeled **Gap**, list any existing gap(s) left by those programs that may already be in place to address an influencing factor. These gaps should help determine the actions that should be taken by the Chesapeake Bay Program through the collective efforts of Goal Implementation Teams, Workgroups, and internal support teams like STAR, or the actions that should be taken by individual partners to support our collective work (e.g., a presentation of scientific findings by a federal agency to a Chesapeake Bay Program workgroup).
5. **Required:** In the column labeled **Actions**, list the number that corresponds to the action(s) you are taking to fill identified gaps in managing influencing factors. Include on a separate line those approaches and/or actions that may not be linked to an influencing factor. To help identify the action number, you may also include a few key words. Emphasize critical actions in **bold**.
6. **Optional:** In the column labeled **Metric**, describe any metric(s) or observation(s) that will be used to determine whether your management actions have achieved the intended result.

7. **Optional:** In the column labeled **Expected Response and Application**, briefly describe the expected effects and future application of your management actions. Include the timing and magnitude of any expected changes, whether these changes have occurred, and how these changes will influence your next steps
8. **Optional:** In the column labeled **Learn/Adapt**, describe what you learned from taking an action and how this lesson will impact your work plan or Management Strategy going forward.

Enhance Partnering, Leadership and Management Goal Implementation Team Logic Table and Work Plan

2018 Work Plan

Primary Users: Goal Implementation Teams, Workgroups, and Management Board | **Secondary Audience:** Interested Internal or External Parties

Primary Purpose: To assist partners in thinking through the relationships between their actions and specific factors, existing programs and gaps (either new or identified in their Management Strategies) and to help workgroups and Goal Implementation Teams prepare to present significant findings related to these actions and/or factors, existing programs and gaps to the Management Board. | **Secondary Purpose:** To enable those who are not familiar with a workgroup to understand and trace the logic driving its actions.

Reminder: As you complete the table below, keep in mind that removing actions, adapting actions, or adding new actions may require you to adjust the high-level Management Approaches outlined in your Management Strategy (to ensure these approaches continue to represent the collection of actions below them).

Long-term Target (the metric for success of Outcome): **TBD**

Two-year Target (increment of metric for success): **TBD**

Mission Statement (current): Continually improve the leadership and management of the CBP and assist watershed partners and stakeholders in building their capacity to become environmental leaders in their community.

Mission Statement (revised): **TBD**

KEY: Use the following colors to indicate whether a Metric and Expected Response have been identified.	
Metric	Specific metrics have not been identified
	Metrics have been identified
Expected Response	No timeline for progress for this action has been specified
	Timeline has been specified

Factor	Current Efforts	Gap	Actions (critical in bold)	Metrics	Expected Response and Application	Learn/Adapt
<i>What is impacting our ability to achieve our outcome?</i>	<i>What current efforts are addressing this factor?</i>	<i>What further efforts or information are needed to fully address this factor?</i>	<i>What actions are essential to achieve our outcome?</i>	<i>Optional: Do we have a measure of progress? How do we know if we have achieved the intended result?</i>	<i>Optional: What effects do we expect to see as a result of this action, when, and what is the anticipated application of these changes?</i>	<i>Optional: What did we learn from taking this action? How will this lesson impact our work?</i>
Public Engagement						
Legislative Engagement at the Federal, State and or Local Levels						
Government Agency Engagement at the Federal, State and or Local Levels						
Non-Governmental Agency Engagement						
Partner Coordination						
Use Conflict: Staffing, Program Resources						
Scientific and Technical Understanding						
Funding or Financial Resources						

Work Plan Actions

Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Expected Timeline
Work Theme #1: Evaluation and Adaptive Management				
1.1	Biennial Strategy Review System (SRS)	<u>Support Goal Teams and associated workgroups in preparation for Quarterly Progress Meetings, through adaptive management mentors, STAR “dry runs,” and pre/de-brief meetings with the SRS Small Group.</u>	SRS Small Group (with GIT 6 Members, Management Board, STAR, STAC, GIT Chairs, Coordinators and Staffers)	Ongoing
		<u>Finalize the program-wide process for updating Management Strategies and 2-Year Work Plans in relation to Quarterly Progress Meetings.</u>		<u>January 2018</u>
		<u>Align/coordinate (as much as possible) the calendars and timeframes of the 2-Year Milestones with the 2-Year SRS process.</u>		<u>January 2018</u>
		<u>Develop a process for changes to Watershed Agreement Goals and Outcomes.</u>		<u>March 2018</u>
		<u>Advance the identification and use of metrics and other analytical tools to strengthen the implementation of the adaptive management decision framework.</u>		<u>Ongoing</u>
		<u>Plan the February 2019 Biennial SRS Meeting (date and location TBD).</u>		<u>3rd/4th Quarter 2018</u>
1.2	Independent Evaluator	Participate in discussions with EPA to determine an approach to meet statutory requirements of CBARA.	Carin Bisland (with Greg Allen, Laura Free)	Ongoing – Discussions completed . Issue on hold pending direction from PSC.
Work Theme #2: Enhancing/Improving the Partnership’s Functionality				
2.1	Governance of the Partnership	<u>Convene an Action Team to review suggested revisions and complete a draft revision of the CBP Governance Document, including a new section related to the Biennial Strategy Review System (SRS). Present to GIT 6.</u>	<u>Greg Allen, Emily Freeman (with Action Team volunteers)</u>	<u>January 2018 – Convene Action Team</u> <u>March 2018 – Present to GIT 6</u>

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Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Expected Timeline
		<u>Present draft and summary of changes to Management Board. Determine whether any review/concurrence is needed from the PSC.</u>	<u>Dave Goshorn</u>	<u>April 2018</u>
		<u>Present outstanding issues to PSC, if needed.</u>	<u>Dave Goshorn</u>	<u>May 2018</u>
		<u>Action Team makes final revisions and presents final draft to the Management Board.</u>	<u>Greg Allen, Emily Freeman (with Action Team volunteers)</u>	<u>June 2018</u>
		<u>Post final Governance Document to CBP website.</u>	<u>Emily Freeman</u>	<u>June 2018</u>
		<u>Ensure that GITs develop membership criteria and present to MB, per the 2018 Governance Document update.</u>	<u>TBD</u>	<u>September 2018</u>
<u>2.2</u>	<u>CBP Organizational Analysis</u>	<u>Analyze existing survey information (e.g. Chesapeake Discovery) to determine if there are any immediate actions that may increase participation.</u>	<u>TBD</u>	<u>March 2018</u>
		<u>Identify organizational elements (e.g. culture, structure, member satisfaction, performance, skills and competencies) for which data collection and analysis could improve organization effectiveness. Reconcile with objectives for improved assessment of performance and drivers for adaptation.</u>	<u>Greg Allen, Carl Hershner, Kirk Havens</u>	<u>June 2018</u>
		<u>Draft and present a plan to MB to pursue data collection and analysis for priority organizational elements and establishing performance thresholds.</u>	<u>Dave Goshorn</u>	<u>July 2018</u>
		<u>Implement the plan.</u>	<u>GIT 6 members</u>	<u>3rd/4th Quarters 2018</u>
		<u>Provide overview and recommendations for organizational enhancement at 2019 Biennial Strategy Review System meeting. For example, discuss possible changes to CBP organization and/or Watershed Agreement outcomes that would improve the ability of partners to engage and participate.</u>	<u>Dave Goshorn</u>	<u>February 2019</u>

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Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Expected Timeline
2.3	Chesapeake Stat	Complete discovery research for Chesapeake Decisions.	Doreen Vetter (with Chesapeake Stat team)	
		Begin design and development for Chesapeake Decisions.	Doreen Vetter (with Chesapeake Stat team)	
2.4	Local Leadership Workgroup	<u>Continual completion of activities listed in the Local Leadership work plan.</u>	<u>Local Leadership Workgroup leadership and members</u>	<u>Ongoing</u>
		<u>Provide quarterly updates to GIT 6.</u>	<u>Andy Fellows</u>	<u>Mar. 2018, June 2018, Sep. 2018, Dec. 2018</u>
		<u>Prepare for and present at November 2018 Quarterly Progress Meeting.</u>	<u>Andy Fellows, Emily Freeman</u>	<u>November 2018</u>
		<u>Revise management strategy and work plan.</u>	<u>Local Leadership Workgroup leadership and members</u>	<u>March 2019</u>
2.5	Budget & Finance Workgroup	<u>Draft and implement 2018 work plan.</u>	<u>Budget & Finance Workgroup leadership and members</u>	<u>First quarter 2018</u>
		<u>Provide quarterly updates to GIT 6.</u>	<u>Dan Nees, Julie Winters</u>	<u>Mar. 2018, June 2018, Sep. 2018, Dec. 2018</u>
Work Theme #3: GIT 6 Administration				
3.1	GIT 6 Membership	Draft initial guidance on GIT 6 membership criteria to be discussed with GIT, <u>with particular emphasis on increasing diversity in GIT membership.</u> Reach consensus on who might be invited to join GIT 6.	<u>Greg Allen</u>	<u>June 2018</u>
		Present criteria for membership to MB, per Governance Document protocols.	Dave Goshorn, Carin Bisland	<u>July 2018</u>

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Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Expected Timeline
<u>3.2</u>	<u>Mission and Vision Statements</u>	<u>Revise the existing GIT 6 mission statement and create a GIT 6 vision statement to better reflect the GIT's current and forward-looking priorities.</u>	<u>Dave Goshorn, Carin Bisland, Greg Allen, Emily Freeman</u>	<u>January 2018</u>
<u>3.3</u>	<u>Communications Workgroup</u>	<u>Explore incorporation of Communication Workgroup into GIT 6.</u>	<u>Dave Goshorn, Carin Bisland, Greg Allen, Emily Freeman, Rachel Felver, Catherine Krikstan, Deb Klenotic</u>	<u>January 2018</u>