**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](http://www.chesapeakebay.net/what/adaptive_management). 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 Coordinator Laura Free ([free.laura@epa.gov](mailto:free.laura@epa.gov)).

The instructions below should be used to complete the table. An example table is available on the [GIT 6 webpage](http://www.chesapeakebay.net/who/group/enhancing_partnering_leadership_and_management_goal_implementation_team) 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 on the [GIT 6 webpage](http://www.chesapeakebay.net/who/group/enhancing_partnering_leadership_and_management_goal_implementation_team) under “Projects and Resources”) 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). These gaps may already be listed in your Management Strategy.
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.

**Tree Canopy Logic Table and Work Plan**

**Long-term Target:** (the metric for success of Outcome): 2400 new acres of Tree Canopy by 2025

**Two-year Target:** (increment of metric for success): 410 acres

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| --- | --- |
| 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 |
| --- | --- | --- | --- | --- | --- | --- |
| *What is impacting our ability to achieve our outcome?* | *What current efforts are addressing this factor?* | *What further efforts or information are needed to fully address this factor?* | *What actions are essential to achieve our outcome?* | *Optional: Do we have a measure of progress? How do we know if we have achieved the intended result?* | *Optional: What effects do we expect to see as a result of this action, when, and what is the anticipated application of these changes?* | *Optional: What did we learn from taking this action? How will this lesson impact our work?* |
| Funding and Finances | Tree Canopy Financing Guide project is addressing actions 1.2, 1.3 and will be complete May 2019 (UMD Environmental Finance Center, Alliance for Chesapeake Bay, Metro Washington COG, Forestry Workgroup partners) | Funding (federal, state, local) to support tree canopy efforts (both planting and preservation) is still primary need cited by partners; need to work with jurisdictions and funding partners to incorporate and act on findings from TC Funding GuideProject (1.2 and 1.3) | [1.2](#Action12), [1.3](#Action13), [1.4](#Action14), [1.5](#Action15) |  |  |  |
| Federal and State Government Agency Engagement | State forestry agencies and USFS are main entities engaged and coordinating through Forestry Workgroup | More engagement with other state agencies (water quality, etc.) and other federal partner agencies needed next cycle, especially around tree canopy as stormwater/MS4/WIP strategy | [1.1](#Action11), [1.4](#Action14), [1.5](#Action15), [2.1](#Action21), [2.3](#Action23), [3.3](#Action33), [4.6](#Action46) |  |  |  |
| Local Government Agency Engagement | Some local engagement occurring through Chesapeake Tree Canopy Network, TC Funding Project, and state WIP planning | Need to ramp up local engagement for tree canopy implementation and tracking through WIP/TMDL process and through TC network capacity building efforts | [1.3](#Action13), [2.1](#Action21), [2.3](#Action23), [3.1](#Action31), [4.4](#Action44), [4.5](#Action45), [4.7](#Action47) |  |  |  |
| Legislative Engagement at State and Local Level: Policies and Ordinances | Some tree ordinance resource sharing through Chesapeake Tree Canopy Network website has occurred | More partnership focus needed to assess and help strengthen local ordinances/policies for tree canopy planting/preservation and capacity for their implementation and/or enforcement (2.1, 2.3) | [2.1](#Action21),[2.3](#Action23) |  |  |  |
| Partner Coordination | Mostly occurring through Forestry Workgroup partners | Within jurisdictions, need greater collaboration with state and local water quality/stormwater programs and NGO efforts; at CBP need greater collaboration with related outcomes/workgroups (local leadership, diversity, stewardship, schools, climate etc.) | [1.4](#Action14), [2.3](#Action23), [3.1](#Action31), [4.1](#Action41), [4.4](#Action44) |  |  |  |
| Scientific and Technical Understanding: Technical Capacity and Knowledge | CBP tree canopy data now widely available and a variety of resources/tools through the Chesapeake Tree Canopy Network website | Need user-friendly tree tracking tool for reporting BMP progress; Need to get data, BMP information, training and resources out to more partners (e.g. local governments, NGOs, stormwater managers, etc.) | [2.2](#Action22), [3.1](#Action31), [3.2](#Action32), [3.3](#Action33), [3.4](#Action34) |  |  |  |
| Public and Landowner Engagement: Education and Outreach | Chesapeake Tree Canopy Network is ready platform for sharing education/outreach resources; Tree Canopy & Environmental Justice project (2017 workshop, 2019 case study/web resources available) | Need to continue and build on Tree Canopy and Environmental Justice project to reach high need/opportunity communities; Increase collaboration with CBP Green Schools efforts | [4.1](#Action41), [4.2](#Action42), [4.3](#Action43), [4.4](#Action44), [4.5](#Action45), [4.6](#Action46), [4.7](#Action47) |  |  |  |
| Environmental Factors Challenging Tree Canopy progress:  Population Growth (Development);  Climate Change (storms, drought, etc.)  Biota (pests, invasive species, etc.)  Habitat Condition (poor soils, utility/infrastructure conflicts, etc. impacting urban tree plantings) | Most of these factors are difficult to manage with existing programs, though information resources and technical assistance providers within states are helpful | Needs more attention in future workplans, weaving in new strategic focus to integrate and address these factors into 2.1, 3.1, 3.4 and other actions TBD | [2.1](#Action21), [3.1](#Action31), [3.4](#Action34) |  |  |  |

|  | WORK PLAN ACTIONS | | | | |
| --- | --- | --- | --- | --- | --- |
| Green - action has been completed or is moving forward as planned Yellow - action has encountered minor obstacles  Red - action has not been taken or has encountered a serious barrier | | | | | |
| Action # | Description | Performance Target(s) | Responsible Party (or Parties) | Geographic Location | Expected Timeline |
| 1.1 | Implement state programs and grants to incentivize tree canopy progress | **STATE LEADS PLEASE UPDATE IF NEEDED**   1. DE – Implement state grant programs to assist communities with tree canopy expansion 2. DC – (1) Increase tree canopy through street tree and other public property plantings (2) Increase tree canopy on private properties through incentive programs, such as River smart Homes 3. MD – (1) Continue implementing existing statewide urban and community forestry programs (Forest Conservation Act, Reforestation Law, and Roadside Tree Law) to maintain the net urban tree canopy statewide (2) Continue implementing existing homeowner tree planting assistance programs such as the Marylanders Plant Trees coupon program and Lawn to Woodland program 4. PA – (1) Increase tree canopy through TreeVitalize tree planting grants (2) Engage colleges and universities around the state in completing i-Tree Streets inventories, with communities developing management plan as match (TreeVitalize grants) (3) Provide inventory and i-Tree training; assist communities with UTC assessments when high resolution data is available and use with inventory data to create management plans 5. VA – (1) Increase tree canopy on public and private properties through grants and incentive programs, such as Virginia Trees for Clean Water and Richmond Urban Tree Canopy Initiative (2) Greater development of the Virginia Tree Stewards which promote good tree care and increase tree planning in their areas of influence 6. WV – Increase tree canopy through Project CommuniTree grants and partnerships 7. NY - Implement state grant programs (such as NYS DEC’s Urban and Community Forestry Grant Program) to assist communities with tree canopy expansion | 1. DE FS, DNREC-CBIG 2. DDOT, DOEE 3. MD FS, MHA, local governments 4. PA DCNR, PSU 5. VA DOF, VA Urban Forest Council, Tree Steward Coordinator 6. WVDEP, WVDOF, Cacapon Institute | 1. DE 2. DC 3. MD 4. PA 5. VA 6. WV | 1. Ongoing 2. Ongoing 3. Ongoing 4. Ongoing 5. Ongoing 6. Ongoing |
| ~~1.2~~ | ~~Assess and summarize federal, state, local and private funding opportunities available to support local UTC implementation, including riparian forest buffers in developed areas~~ | COMPLETED - remove |  |  |  |
| 1.3 | Provide guidance/case studies/best practices for local governments and partner organizations on how to strengthen funding and partnerships for UTC | Disseminate and provide training in the new Financing Urban Tree Canopy Programs guide (at UTC Summit 2.0 and plugging into workshops/meetings in each state) | Alliance for the CB/USFS/FWG/ LLWG  Environmental Finance Center | Bay-wide | Fall 2019-Fall 2020 |
| 1.4 | Explore options for expanding UTC funding for diverse Chesapeake communities through leveraging federal, state, and private resources (e.g. work with Bay Funders Network) | 1. Convene a funding/policy solutions roundtable in conjunction with UTC Summit 2.0 2. Use roundtable findings and state-level strategy meetings to develop a set of funding/policy recommendations for EC Council meeting 2020 | USFS/FWG, with support from CBC, State leadership, NGOs, etc. | Bay-wide | 1. Fall 2019 2. Spring 2020 |
| ~~1.5~~ | ~~Work collaboratively with Bay Program partners to identify, legislative, budgetary, and policy needs to advance the goals of the Chesapeake Bay Agreement. We will in turn pursue action within our member state General Assemblies and the United States Congress (per CBC Resolution #14-1).~~ | SUGGEST REMOVING – incorporate CBC support into 1.4 |  |  |  |
| 2.1 | Review state and local policies in place to support urban tree canopy and provide recommendations on best practices, model ordinances, etc. for Bay jurisdictions (e.g. Annapolis tree canopy legislation and volunteer program cited as a model) | 1. Covered in actions 1.3 and 1.4 above 2. Develop and promote delivery of a training module based on CWP’s Forest-Friendly Codes and Ordinances Worksheet and other resources (at UTC Summit 2.0 and plugging into workshops/meetings in each state) | 1. USFS/FWG 2. USFS/FWG/   LLWG? PSU?  Center for Watershed Protection | Bay-wide | 1. Fall 2019-Spring 2020 2. Fall 2019-Fall 2020 |
| ~~2.2~~ | ~~Support efforts to credit/incentivize tree canopy protection in addition to planting in the TMDL framework~~ | 1. COMPLETED - Remove |  |  |  |
| 2.3 | Work with stormwater program managers (federal/state/local) to better integrate urban tree canopy and riparian buffer goals with TMDL/WIP implementation and MS4 programs | 1. Collaborate with Chesapeake Stormwater Network (CSN) to promote and expand use of urban tree BMPs by local stormwater managers and engineers 2. Coordinate with state TMDL/WIP and Stormwater Program Managers to encourage more urban tree BMPs in WIP implementation | 1. USFS/CSN 2. FWG/WQGIT/   USWG | Bay-wide | 1. Spring 2019-Fall 2020 2. Spring 2019-Fall 2019 |
| 3.1 | Provide guidance, training, and technical assistance to help local governments and partners develop robust urban tree canopy implementation programs | 1. Convene UTC Summit 2.0 to provide training for urban forestry practitioners across the watershed in the latest tools, guidance and resources 2. Support GIT-funded Turf to Buffers training development and pilot in Virginia | 1. USFS/FWG/LLWG 2. Virginia DOF/   Contractor/  partners | 1. Bay-wide 2. Virginia | * + - 1. Fall 2019       2. Spring 2019-Fall 2020 |
| 3.2 | Support the development of Bay-wide high resolution UTC data updated regularly (e.g. every 5 years) to track progress/net gain | 1. Support development of tree canopy data and analysis as part of the next update of high resolution Land Cover data 2. Continue to develop and refine Tree Canopy Indicator data for reporting progress | USGS/FWG | Bay-wide |  |
| 3.3 | Work with states to develop user-friendly tracking and verification systems for groups to report urban tree planting to the Chesapeake Bay model for BMP credit, in alignment with Chesapeake Bay Program Forestry BMP Verification Guidance | 1. Develop proposal and pursue funding to support jurisdictions needs for a Tree Tracking tool to capture urban tree BMPs implemented by local and NGO partners 2. Build and train network of local partners reporting urban tree BMPs to the CBP model | 1. USFS/FWG 2. FWG-states | Bay-wide | Spring-Summer 2019  Fall 2020 |
| 3.4 | Provide guidance and standards/best practices for tree planting and maintenance to improve long-term survival | Grow the network of “tree stewards” through new training programs in Maryland and Delaware and expansion of existing programs in other Bay states (USFS grant to Alliance for Chesapeake Bay and DE Forest Service) | ACB/USFS/ DE, MD, PA, VA | Bay-wide | Spring 2019-Fall 2020 |
| 4.1 | Work with the Diversity Action Team and solicit guidance from LGAC and others to facilitate greater local participation, including representation of underserved and underrepresented communities | Work with DAT, Local Leadership Workgroup, Citizen Stewardship Team, LGAC, CAC and other partners to integrate Tree Canopy opportunities into their other Strategy workplan efforts | FWG, DWG, LLWG, GIT5, LGAC, CAC | Bay-wide | Ongoing |
| 4.2 | Use online tools/webinars/list serves to support ongoing training and information sharing in the urban forestry community of practice (e.g. a “Chesapeake Tree Canopy” group within the existing Chesapeake Network tools) | Maintain and strengthen the Chesapeake Tree Canopy Network and e-newsletter as our primary hub for resources and communication | ACB/USFS/FWG/  CBP Website Team | Bay-wide | Ongoing |
| 4.3 | Develop and pilot social marketing and other innovative outreach methods to broaden community engagement in urban tree canopy implementation | 1. Work with CBP Communication Team on a strategic Communication Plan for increasing the use of tree BMPs across the watershed 2. Develop messaging materials to support the Plan, with latest research on tree canopy co-benefits and cost-effectiveness | USFS/FWG/CBP Communications/  LLWG | Bay-wide | 1. Spring 2019 2. Summer 2019 |
| 4.4 | Develop communication and outreach strategies targeted to diverse audiences, focusing on areas with greatest need and opportunity (e.g. low canopy/underserved communities; schools, faith-based, and other civic organizations; homeowner associations; etc.) | 1. Collaborate with Local Leadership Workgroup on Tree Canopy module for watershed curriculum for local officials 2. Complete tree canopy-environmental justice-community engagement case studies and pilot projects in Anacostia and disseminate findings broadly 3. Coordinate with GIT-5 project about BMPs on school properties regarding tree canopy opportunities | 1. USFS/FWG, LLWG 2. MWCOG/USFS/ partners 3. Cacapon Institute/ GIT5/ contractor | Bay-wide | 1. Summer-Fall 2019 2. Summer 2019 3. Spring 2019-Fall 2020 |
| 4.5 | ~~Continue and increase coordination between local agencies, non-profits, and utilities intended to protect property from and assist homeowners with maintaining over hanging tree limbs threatening property and human health~~ | SUGGEST DELETING – not ranked as high priority for this group to address |  |  |  |
| 4.6 | ~~Continue to increase and promote the number of Arbor Day events and UTC education programs on DoD installations for military community awareness~~ | Will check in with DOD to see if they are attached to this action; otherwise remove | DOD | DOD installations |  |
| 4.7 | Develop educational resources that expand the awareness, appreciation, planting and stewardship of fruit and nut trees within educational institutions, under-served communities, parks and other public lands | Compile and feature resources and community stories (food forest, urban orchards) on Chesapeake Tree Canopy Network website | USFS/FWG | Bay-wide | Fall 2020 |
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