**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.

**Healthy Watersheds Logic Table and 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):

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

|  |  |
| --- | --- |
| 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?* |
| Local Legislative Engagement: Policy maker understanding of status and importance of healthy watersheds | * MD, DC, and PA coordinating communication efforts and forums * Trout Unlimited outreach in WV, using brook trout as conservation tool | Need to understand how to package materials in effective manner  Need to know how to get materials to the correct audience | [**2.1**](#Management21)**,** [**2.2**](#Management22)**,** [**2.3**](#Management23)**,** [**4.1**](#Management41)**,** [**4.2**](#Management42) |  |  |  |
| Federal and State Engagement: Policy maker understanding of status and importance of healthy watersheds | * FWS, DC, and PA work to leverage funding * FWS and EPA reinstituting the Mid-Atlantic Highlands Action Program * EPA progress on integrating protection in the 319 program, 303(d) program and into source water protection * DC River smart Homes Program, tree plantings, and LID retrofits * NY Open Space plan, Dairy Nutrient Management plan * PA forest conservation easement program, RFB leadership team, Stream ReLeaf program | Need to engage more federal partners  Need to assist states in policy and program implementation | [**3.1**](#Management31)**,** [**3.2**](#Management32)**,** [**4.3**](#Management43) |  |  |  |
| Partner Coordination: Engaging all available partners in the watershed |  | Need more involvement of federal and state agencies in the GIT | [**3.2**](#Management32) |  |  |  |
| Partner Coordination: Sharing of scientific understanding |  |  | [**4.1**](#Management41) |  |  |  |
| Scientific and Technical Understanding: Create inventory of healthy waters and watersheds | State efforts | Need continued assessments to determine if state-identified healthy waters and watersheds are still healthy and if additional waters and watersheds have become healthy | [**1.1**](#Management11) |  |  |  |
| Scientific and Technical Understanding: Development of information on healthy watershed vulnerabilities | * EPA Preliminary Healthy Watersheds Assessment * Climate Resiliency Workgroup efforts * Land Change Model * MDP, MDE, and DNR developing vulnerability information for Maryland healthy watersheds | * Need information on development pressure and climate change * Need to review and incorporate findings from TNC and USGS studies * Need to collaborate with the Climate Resiliency Workgroup | [**1.2**](#Management12) |  |  |  |
| Scientific and Technical Understanding: Information to prioritize healthy watershed protection |  | Need to know vulnerability and protection status of healthy watersheds | [**1.3**](#Management13) |  |  |  |
| Scientific and Technical Understanding: Expand assessment activities | * EPA Landscape-scale assessments in PA * USFS tracking forest cover * GIT2 brook trout assessments * USACE, NFWF, and state partners conducting Chesapeake Bay Comprehensive Water Resources and Restoration Plan * DC DOEE Fort DuPont Watershed Restoration Project * MD agencies stream monitoring * PA tracking forest protection | Need additional state capacity | [**1.4**](#Management14) |  |  |  |
| Finances |  |  | [**2.3**](#Management23)**,** [**3.1**](#Management31) |  |  |  |

|  | 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 |
| Management Approach 1: Tracking Healthy Waters and Watersheds | | | | | |
| 1.1 | Continue gathering inventory of healthy watersheds | Retrieve data and compare with State-identified Healthy waters and watersheds | GIT4, CBPO GIS Staff |  | Ongoing |
| 1.2 | Develop vulnerability information | * Develop and implement a methodology to establish climate related goals and baselines for individual Chesapeake Bay Agreement Management Strategies such as the Healthy Watersheds Management Strategy. * Forecast land development scenarios * Utilize sea level rise/storm surge assessments * Incorporate resiliency study * Incorporate Resource Conservation Opportunity Areas * Quantify impact of land conversion on healthy watersheds and habitats | GIT4, CBPO GIS Staff, STAR, Climate Resiliency Workgroup, Land Use Workgroup |  | December 2017 |
| 1.3 | Prioritize protection | * Assess protected status of healthy watersheds * Compile and publish bi-annual Chesapeake Bay Protected Lands Dataset | GIT4, CBPO GIS Staff |  | Ongoing |
| 1.4 | Maintain and expand assessment activities and information | * Work with STAR to determine current and future monitoring needs and outline gaps * Form a cross-GIT tracking workgroup to work on: healthy watershed metrics, analyses of protocol for determining status of each watershed, assessments of watershed protection priority, and exploring a method to track marginally healthy watersheds * Monitor high resolution imagery processing and work with LUWG to determine how data can be incorporated into a healthy watershed tracking framework * Expand assessment activities and information for forests and forest conservation * Conduct GIS assessments to identify key high value brook trout habitat to conserve and those areas that are considered marginal and in need of restoration | GIT4, CBPO GIS Staff, STAR, Land Use Workgroup, Forestry Workgroup |  | * December 2017 * TBD * TBD * December 2017 * TBD |
| Management Approach 2: Local Leadership – strengthen local commitment and capacity to protect their healthy watersheds | | | | | |
| 2.1 | Outreach, including: effectively conveying information on the status of healthy watersheds to local stakeholders | Work collectively to improve outreach strategies, and better "get the word out" across multiple Management Strategies to determine the best approaches and methods for reaching key stakeholders | GIT4, LGAC |  | May 2016 |
| 2.2 | Identify the various tools that may be used, primarily by local governments, to protect healthy watersheds | Gather, summarize and place on the Chesapeake Bay Program website or other locations as determined in the Local Leadership Management Strategy approach for improving transfer of knowledge to locals, existing studies and reports on the costs, benefits and effectiveness of both local and state level land use policy options, incentives and planning tools | GIT4 |  | December 2017 |
| 2.3 | Leverage Funding |  |  |  |  |
| Management Approach 3: Federal and State Leadership | | | | | |
| 3.1 | Leverage Funding |  |  |  |  |
| 3.2 | Implement new or improve existing policy/programs/research | Engage with federal agencies other than EPA (such as FERC and DOT) to leverage opportunities within those agencies so that they can set the stage for state and local governments to further healthy watershed protection | GIT4 |  | January 2018 |
| Management Approach 4: Support State-based Efforts | | | | | |
| 4.1 | Provide a valued forum for mutual learning and exploration | Continue meeting 2-4 times a year and at meetings continue hosting Case Study presentations related to healthy watershed protection/tracking | GIT4 |  | Ongoing |
| 4.2 | Develop information resources and support communications | * Provide messages and resources to CBP Communications staff * Share presentations, slides, pictures, graphics, to help partner agency staff prepare presentations, reports, etc. with effective healthy watersheds messages | GIT4 |  | Ongoing |
| 4.3 | Promote the science | Continue to work with the Chesapeake Bay Program and partners to quantify and incorporate conservation practices into the Chesapeake watershed modeling efforts and to explore how land use protections might be used to quantify future pollutant load reduction incentives for land conservation | GIT4 |  | Ongoing |
|  |  | | | | |