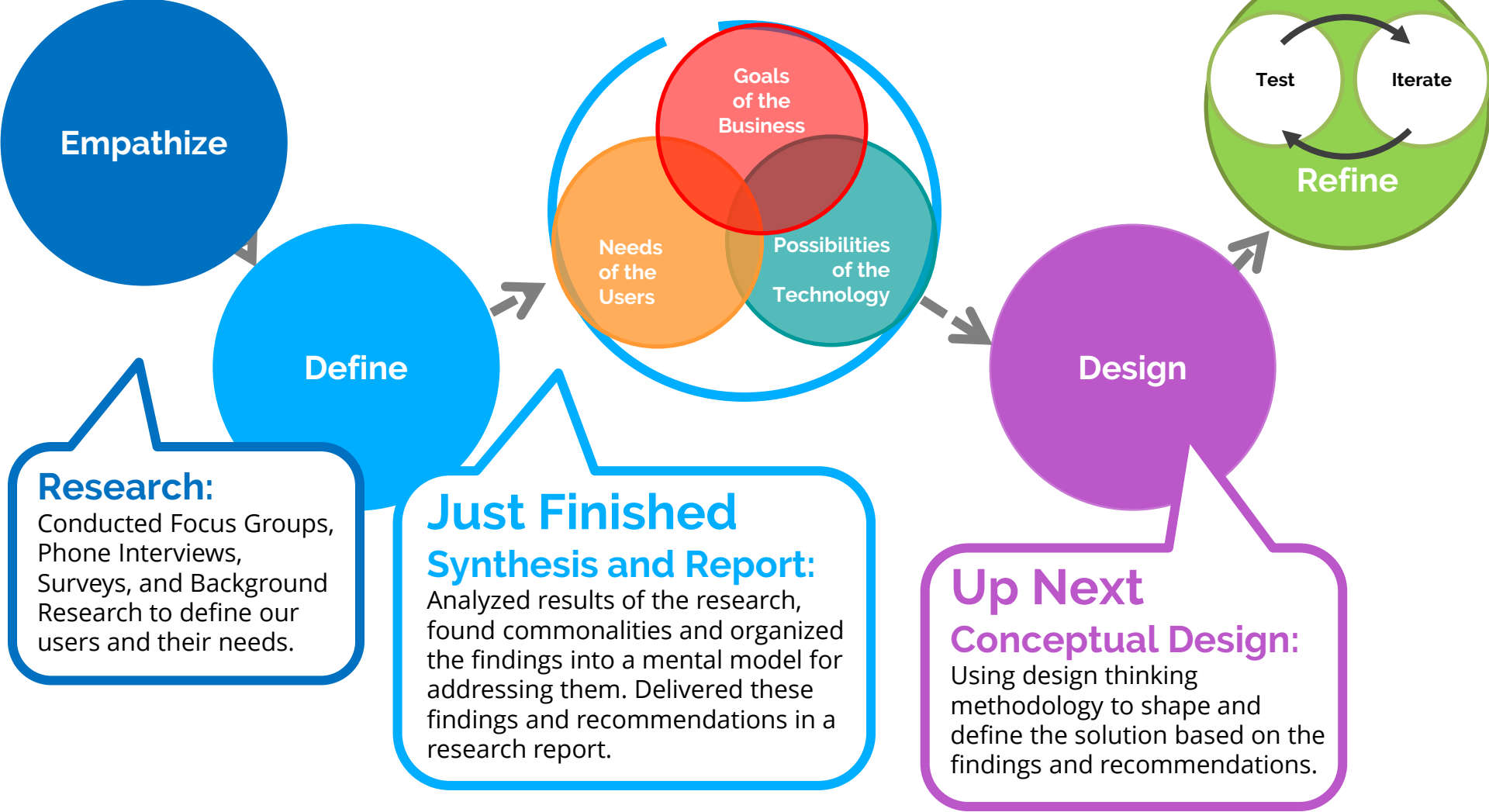




Chesapeake Decisions User Research Report

Goals for Today

- To update you on the status of Chesapeake Decisions
- To present the findings from the research phase of Chesapeake Decisions
- To discuss our recommendations for addressing these findings
- To answer any questions you may have about methodology, findings, recommendations, or next steps



The **UX Design** Process

Business Need

ChesapeakeDecisions

Our work is guided by a decision-making framework that supports adaptive management: learning while doing and adjusting our efforts as needed.

What is ChesapeakeDecisions?

ChesapeakeDecisions will support the process of [adaptive management](#), which was [adopted](#) by the Principals' Staff Committee in 2011. Our success in restoring the Chesapeake Bay will require all of our partners to follow this decision-making framework: to learn while doing, take actions without guarantees, support effective monitoring, transparently assess progress and redirect efforts when needed.

ChesapeakeDecisions will provide the Chesapeake Bay Program's [Goal Implementation Teams and Management Board members](#) with tools to collaborate on the work that is needed to achieve the goals and outcomes of the Chesapeake Bay Watershed Agreement. Please [contact us](#) with questions or comments. You can also learn about [best management practice review panels](#).

Business Need, Expanded

Improving decision-making is a broad goal, and as we learned more, we developed these supporting project goals to guide our research:

- **How can we help the Program and the teams within work toward their goals and outcomes, anticipating and proactively approaching their decisions?**
- **How can we help Leadership to identify issues and track the work being done across the Program, allowing them to better understand and support their needs?**
- **How can we facilitate connections between groups to improve their awareness when making decisions?**
- **How can we help groups document their decisions and reasoning? How might that process improve their decision-making?**

Research Findings

Organized into 4 areas:

- 1) Internal Communication and Awareness
- 2) Adaptive Management
- 3) Internal Processes
- 4) External Dependencies

Finding Area 1: Internal Communication and Awareness

- **Leadership to Members**

- Leaders want to observe projects at a more granular level than external-facing tools like Chesapeake Progress and Bay Barometer are designed to show

- **Members to Leadership**

- Members want more specific and timely support from Leadership
- Members want a way to “tell their story”, document their decision-making process (i.e. reasoning, various approaches considered, priorities etc.)

- **Groups to Groups**

- All responsibility for lateral awareness falls on coordinators and staffers, but they might not know to look into something until it's presented to them
- Members felt that groups are missing opportunities to align projects and work toward mutual goals
- Collaboration was mentioned often, however the nature of the partnership (physical distance, limited time, etc.) means that meetings are driven by agendas and therefore focused on planning, known issues, or deadlines

- **Additional Perspectives**

- Groups want to make decisions that are more informed, especially with regards to qualitative challenges like political roadblocks or other external factors
 - Inferred these challenges likely affect other projects and they could benefit from discussing strategy
- There is no system to proactively identify opportunities to connect across GITs

Finding Area 2: Adaptive Management

- **Consistency and Standards**
 - Lack of an oversight system makes it hard to establish consistency
 - Perception that guidance has tapered off since Adaptive Management was adopted and goals were set, groups are not sure how to approach next phases
 - Need to identify fit for all outcomes when establishing requirements (i.e. it might not be possible for Adaptive Management/decision-making to look the same for all groups)
- **Goal Setting**
 - Some groups have set goals without any performance indicators, Leadership will have a difficult time monitoring these
 - Not all goals are discrete or distinct from other goals in program, its critical that groups consider the work of overlapping goals when determining their own approach
 - Prioritization is a challenge, groups with too many projects may struggle to monitor and make effective decisions toward all of them
- **Following the Framework**
 - Groups set goals without considering acceptance criteria, many are still unable to explain how they will approach their first workplan revision and report progress
 - Some members thought 2 year timelines were unrealistic
- **Assessment**
 - Lack of tracking data hampers some groups more than others
 - Many wondered whether optimism or pessimism was the best approach to modeling and reporting in the short-term

Finding Area 3: Internal Processes

- **Workflow**

- Groups mapped the GIT6 Funding Process: Fairly consistent in start and finish, but each group determined their own workflow in middle
- Same exercise for Adaptive Management which is much more complicated with many more interdependent steps, this lack of consistent process caused more issues, magnified fundamental problems
- The smallest workflow increment they have currently is 2 years, but even that period of time (which some say is too short) wasn't 'small' enough to give them indicators of what to do next or how to break down and strategize upcoming deadlines

- **Transparency**

- Wide range of perceived levels of scrutiny and observation from the outside
- Timelines established in the Watershed Agreement dictate when they need to turnover progress and produce documentation, but none of the GITs have concrete plans for starting this part of the process or doing anything to continually and pro-actively support the requirements
- No consistent methods outside of meeting structure to revise documents or discuss approach to deliverables and decisions

- **Autonomy**

- Each group has freedom to determine its own processes and workflow, which appears to be tied to the demands on members' time and volunteer nature of partnership
- Members voiced concern that Chesapeake Decisions will breed new, time-consuming requirements that will not be helpful to them at the individual or project level

Finding Area 4: External Dependencies

- **Pressure to Succeed**

- Members felt at times the external expectations were unrealistic
- Members believe it is critical to think about quality over quantity for decisions at the project level, despite pressure to meet quantitative markers in the medium to long term

- **Advocacy, Sales, and Marketing**

- Advocacy, defending choices to external groups, and/or “selling the cause” is a necessary piece for success, but this type of thinking does not come naturally to all personalities
- Processes to activate and leverage groups like Local Leaders as ambassadors of a specific message are inconsistent, little two-way communication going on here
- Cognitive Load Theory: Difficult to explain some of these concepts to outsiders

- **Fatigue Factor**

- Groups feel they spend a lot of time anticipating issues and defending their choices that it impedes actual work or action
- Members don’t have an efficient way to document naturally throughout the workflow; planning might be well documented, but their eventual reasoning for taking a particular approach or the chain of logic that leads to a decision might not be

- **Trust and Reporting**

- Program has no consistent system for predicting or accounting for external issues that may impede progress; rely on anecdotal reporting from members at decision points
- Members are apprehensive about how workplan revisions will be received by local jurisdictions

Recommendations

Organized into 4 areas:

1

Within Each Group

2

Leadership
to Each Group

3

Groups to Groups

4

Additional
Relationships

Recommendation 1

Implement processes that guide the workflow.

Groups need a tangible roadmap for Adaptive Management that is focused on their internal working needs, not on external deliverables.

- Emphasize a mentality of maximizing and summarizing progress
- Improve efficiency and enhance the existing ways of working
- Avoid tools that require 'Feeding the Beast'

1

2

3

4

Within Each Group

Recommendation 2

Improve awareness and support from Leadership.

Leadership needs to establish more concrete expectations around Adaptive Management, and in return deliver increased aid to projects.

- Establish project-level requirements for communicating status to leadership; but, don't expect every single member to be a 'user'
- Continue to support autonomy, within reason
- Be open to process revisions that may be revealed

1

Within Each Group

2

**Leadership
to Each Group**

3

4

Recommendation 3

Deliver compounded rewards. Allow groups across the Program to connect through their mutual use of a system, improving decision-making through awareness, communication, and alignment.

- Allow groups to proactively seek out alignment with other projects, prevent duplicated efforts, and encourage progress toward outcomes that is considerate of all factors
- Share best practices in real-time to improve deliverables and allow groups to learn Adaptive Management from each other
- Foster a thought-leader mentality

1

Within Each Group

2

Leadership
to Each Group

3

Groups to Groups

4

Recommendation 4

Focus on tools that evolve with the Program, and help it to evolve. Solutions for a problem as complex as decision-making need to be flexible and adapt to changing needs. Explore tools that can help usher in these inevitable changes.

- Account for growth and change with flexible feature sets
- Facilitate growth and change by providing space to connect members and foster conversation in innovative ways
- Focus on creating a trusting and productive space first

1

Within Each Group

2

Leadership
to Each Group

3

Groups to Groups

4

**Additional
Relationships**

Conclusion

We considered these factors:

- The relative youth of Adaptive Management as a model
- Uncertainty on the part of members about what they will need in order to make decisions
- The incomplete or inconsistent data sets that groups rely on
- The absence of a clear idea of what public or oversight groups might expect

Taken together, these factors made it apparent to the team that the Program **does not need a decision automation tool** at this time, as groups **do not yet have a consistent process that could be automated**.

The Program first needs to lay the foundation upon which effective, efficient, and informed decision-making can happen.

Conclusion

The Chesapeake Bay Program needs to **establish consistency in the way members work toward decisions**, including how they **weigh** complicated factors, **document** them, **communicate** issues to leadership, and ultimately **report** to the public and oversight groups.

Leadership and Program members need to **take steps toward defining a way of working** that is **more detailed** than what is outlined in public-facing documents like the Watershed Agreement, and one that is **more concrete** than the existing Adaptive Management Framework.

Conclusion

Therefore, our solution will focus on **delivering an environment** to **create these consistent processes collaboratively** and **observe decision-making** across the program with an **emphasis on improved awareness, strategic planning, alignment, and communication.**

Conceptual Design Phase

The specifics like: what features are included, how they work, what they might look like, who uses them, and when they use them are all areas we will define in the **Conceptual Design Phase** (next)

What we will do:

- Create concept maps and mental models the help us structure and relate features
- Create user flow diagrams that relate to real-world work
- Test early concept and structure models with users through virtual testing tools
- Refine site taxonomy and function with testing results
- Build a high-level prototype

Immediate Next Steps

We will work with the project team and leadership to address some key requirements and as we enter the **Conceptual Design Phase**, especially:

- What specific types of information leadership groups might need for oversight, and at what frequency they would expect updates from projects or groups
- What minimum requirement actions we are willing to establish for groups and some key user roles

These discussions will help us to establish the commitment from the program to these concepts from a policy standpoint as we begin to define and design the solution.