



# Strategy Review System

Revisions to the SRS Process in Advance of the 4<sup>th</sup> Cycle

September 5, 2023



**Chesapeake Bay Program**

*40 years of science, restoration and partnership*



# IN THE NEXT 25 MINUTES...

## 4<sup>th</sup> CYCLE

- Proposal
- Revisit  
Recommendations
- Lightening the Load
  - Sequence of  
Science
- Calendar of Cohorts

## DISCUSSION

2023



## SRS 4<sup>TH</sup> CYCLE PROPOSAL

“

...writing to ask for your support to **adjust the 4th cycle August 2023 starting point**. Our goal is to **target the November QPM meeting** as the revised start date, but we need to evaluate the respective timelines before finalizing that date. While the team does not anticipate large changes for the 4th cycle, we hope to **improve the experience** of those interacting with the SRS process while **maintaining the integrity of the overall adaptive management system**.

”



# REVISITING RECOMMENDATIONS & THEMES

## Retrospective on Lessons Learned from the Chesapeake Bay Program Strategy Review System's 3<sup>rd</sup> Cycle with Suggested Adaptations to Address the Issues

### Executive Summary

#### Overview

During the winter 2022-23, the Strategy Review System (SRS) Planning Team conducted a retrospective analysis to extract lessons learned from successes and challenges in the Chesapeake Bay Program (CBP) partnership's efforts to achieve 2014 Chesapeake Bay Watershed Agreement goals and outcomes. The retrospective was informed through the lens of activities and products developed by Goal Implementation Teams (GITs), Workgroups, the Scientific Technical Assessment and Reporting Team (STAR), and the Scientific Technical Advisory Committee (STAC) during interactions with the Management Board while conducting the 3<sup>rd</sup> 2-year cycle of the SRS (May 2021-May 2023). Outcome leads and coordinators were surveyed for their insights.

Ten key lessons were identified by the SRS Planning Team (Table 1). Strategies to improve partnership successes and accelerate progress were recommended with each lesson. An extended discussion explaining the issues involved in the Lessons Learned and addressing Suggestions for Adaptation identified is provided in the Discussion section. Outcome-specific successes and challenges are summarized in Appendix A.

Table 1. 10 Lessons Learned and Adaptations to consider about the Chesapeake Bay Program (CBP) partnership's activities and efforts to address outcome achievement extracted from products of the Strategy Review System (SRS) 3<sup>rd</sup> cycle, May 2021-May 2023.

Lessons Learned	Adaptations
1. The Strategy Review System is successfully informing the implementation of the 2014 Agreement goal, but it could use strategic modification for improved return on investment	Strategically modify the current SRS process and living documents for use when planning and implementing activities beyond 2025
2. Outcomes may be presented in the Agreement as if they are meant to have equal priority for dedicating resources, management activity and achievement. However, experience shows that attention and effort addressing the outcomes is unbalanced	Set an initial strategy for adjusting the present unbalanced distribution of resources affecting outcome achievement to realize more equity in support toward achieving all outcomes; Rebalance emphasis across outcomes more equitably; employ Structured Decision Making to help achieve rebalance and prioritization;
3. Capacity limitations affect the rate of achievements;	Strengthen workforce; managing expectations should further be aligned with available capacity or support changes and investments to enhance capacity; help CBP agencies and partners access new resources to address targeted capacity limitations
4. Outcomes do not live in silos (e.g., climate, diversity), they are interdependent requiring more cross-outcome integration to achieve success for all outcomes	Utilize systems thinking perspective when considering structure of outcomes beyond 2025

## OUTCOME ATTAINABILITY AND PRIORITIZATION CONVERSATIONS: A SYNTHESIS

Carin Bisland, EPA CBPO  
Vice-Chair GIT 6

## Chesapeake Bay Program 2023 Strategy Review System (SRS) Biennial Meeting Charlottesville, VA May 11-12, 2023

### Report in Brief

The 2023 SRS Biennial Meeting convened the Chesapeake Bay Program partnership to fully integrate learnings into the charting of a course to 2025 and beyond 2025 for all outcomes so that the response to the Executive Council (EC) charge is representative of the full spectrum partnership. The following objectives were established to reflect desired outcomes from the collaborative discussions:

1. Science: Determine opportunities to leverage action for existing science challenges and identify emerging issues.
2. Restoration: Address outcome attainability (and non-attainment) by identifying priorities and formulating strategies to address critical knowledge gaps and develop a communication strategy for communicating progress and challenges.
3. Partnership: Assess our partnership for where we have gaps and how we can ensure a diverse and robust partnership moving forward.

This two-day, hybrid event gathered about 100 participants in Charlottesville, VA and virtually. The Biennial Meeting included a "gallery walk" to showcase 25 posters and their authors about outcome successes across the partnership, financial resources, targeting tools, and other informative projects. The meeting also used the World Café technique to host large group collaborative dialogue among all participants around key questions in the Chesapeake Bay partnership.

This report in brief presents repeated themes, ideas, and recommendations collected from the Biennial Meeting, organized in reverse order of the objectives: partnership, restoration, and science.

#### 1. PARTNERSHIP

##### 1.1 Value of the Partnership and Opportunities for Improvement

Meeting participants agree that the partnership is valuable. As we work to restore, protect, and improve the Bay watershed, the partnership provides essential accountability, consistency, and stability. Partners recognize that the program is built on trust, expertise, and dedication, which support progress towards achieving goals. We have a strong sense of the value of our work, which stands on principles of scientific integrity and excellence.

Though the partnership has many strengths, there is a need to better define our partnership so that we do not try to be all things to everyone. This theme is reiterated in comments related to improving outreach and engagement and developing a communications strategy (Section 1.4 and Section 1.5, respectively). Learning and adapting are cornerstones of our program driven by science-based policy. Some participants noted that we should have the courage to learn from mistakes, make changes if things don't work, and follow the best science to become better watershed stewards. This adaptive frame of mind can be applied across the program, from outcome attainability to the governance and structures of the partnership.

As we hear calls for accelerating progress, we need to acknowledge our intense internal schedules and the limited resources available. It would be beneficial for the partnership to assess how the CBP conducts business, inviting new approaches into our work that results in greater balance across

1

# SRS 4<sup>TH</sup> CYCLE – TOPICS FOR CO-DEVELOPMENT

## WORK SESSIONS ON JULY 13, JULY 26, AND AUGUST 16

- Lighten the Load
  - How do we stay true principles of adaptive management in a way that is less burdensome?
- Sequence of Science
  - How do we improve upon when we engage STAC & STAR in the SRS?
- Calendar of Cohorts
  - Where do commonalities exist among outcome themes?

# LIGHTENING THE LOAD: STREAMLINED PROCESS

## Revision

- Decreased the number of required steps from 14 to eight
  - Three additional steps that are optional

## Benefits

- Streamlines SRS Process
  - Less burdensome for MB members and Outcome Leads, including Coordinators and Staffers

# PROPOSED SRS PROCESS

1

## COHORT NOTIFICATION

Cohorts notified 180 & 90 days prior to QPM

180 days before QPM  
90 days before QPM

2

## PREPARE CHECK-IN MATERIALS

Review MS, complete R/Y/G activity on LAP, & answer "Looking Back" questions.

3 months before QPM

3

## MEET STAC & STAR

Logic analysis w. STAC  
Science Needs w. STAR  
Complete Outcome Review Summary

Abt. 8 weeks before QPM

Op Optional Step

# SEQUENCE OF SCIENCE

## Revision

- Move engagement with STAC & STAR from after QPM to before QPM
- Ask for STAC experts to help:
  - Conduct the adaptive management analysis and highlight the learning, based on the logic model
  - Define and shape science needs prior to the goal team preparing their QPM documents

## Benefits

- Better leverage STAC & STAR expertise & promote more meaningful engagement
- Supports more thoughtful reflections in advance of the MB meeting

## Next Steps

- Presentation & decision at September STAC meeting
- This will be an iterative process, rolled out during the 4<sup>th</sup> cycle



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Science Needs w. STAR  
Complete Outcome Review Summary

Abt. 8 weeks before QPM

Op

## SRS CHECK-IN MEETING

Optional opportunity to meet with SRS Team to discuss process

7 weeks before QPM

4

## C/S DRY RUN W STAR

Practice presentation. Opportunity for cross-cohort collaboration

3 weeks before QPM

5

## DUE: QPM MATERIALS

Provide Outcome Summary Review to MB. PowerPoint presentation optional.

2 weeks before QPM

Op

Optional Step

# LIGHTENING THE LOAD: STREAMLINED DOCUMENTATION

## Revision

- Reviewed and consolidated elements from the following templates into a single "Outcome Summary Review" document
  - Outcome Attainability
  - Logic & Action Plan
  - Narrative Analysis
  - PowerPoint
- No required PowerPoint Template
- No required Workplan Template
- Workplan is not required to be submitted to MB or for Public Review, but must still be completed & posted

## Benefits

- Lighten the Load - **Eliminate redundancy** in reviews, documentation and reporting, and avoids collision of timelines when significant reviews are due.
- Emphasis - Utilize the **outcome attainability analysis** and CESR to drive our focus and energy until 2025.
- Gives outcome leads greater flexibility to prioritize successes or challenges they bring to MB.
- Only one document required for submission to the MB.

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## QUARTERLY PROGRESS MEETING

Lightning Talk abt outcome attainability & problem solving. Emphasize off-track outcomes in 2024  
On track outcomes may pass

Op

Optional Step



## QUARTERLY PROGRESS MEETINGS

- Aim for 5-6 hour, in-person meeting
- All outcomes will go through the full SRS Process once every two years
- Where possible, prioritize discussion of off track outcomes in the first year of the 4<sup>th</sup> cycle
  - Off track outcomes that recently completed their QPM may give a brief update instead of repeating the full process in the first year
  - In the first year, on track outcomes may opt for:
    - a "pass"
    - a 10 minute update, with time for clarifying questions from the MB
    - the full SRS process, with time for a 45 minute QPM presentation & discussion

# Calendar of Cohorts: Annual/Biennial Schedule with 4 Cohorts

- Outlook Uncertain
- Outlook Off Track

2023	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
					Biennial Meeting			4 <sup>th</sup> Cycle Starts			Living Resources	<ul style="list-style-type: none"> <li>• SAV</li> <li>• Wetlands</li> <li>• Brook Trout</li> <li>• Black Duck</li> <li>• Oysters</li> <li>• Bl. Crab Abundance</li> <li>• Fish Passage</li> <li>• Fish Habitat</li> <li>• Forage Fish</li> </ul>
2024	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
		People			Watersheds			Clean Water			Living Resources	<ul style="list-style-type: none"> <li>• SAV</li> <li>• Wetlands</li> <li>• Brook Trout</li> <li>• Black Duck</li> <li>• Oysters</li> <li>• Bl. Crab Abundance</li> <li>• Fish Passage</li> <li>• Fish Habitat</li> <li>• Forage Fish</li> </ul>
		<ul style="list-style-type: none"> <li>• Stewardship</li> <li>• Diversity</li> <li>• Stud. Env. Lit.</li> <li>• Env. Lit. Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Sust. Schools</li> <li>• Public Access</li> <li>• Local Leadership</li> </ul>		<ul style="list-style-type: none"> <li>• Healthy Watersheds</li> <li>• Tree Canopy</li> <li>• Forest Buffers</li> <li>• Climate Adaptn</li> <li>• Climate Mntr</li> <li>• Stream Health</li> <li>• Protected Lands</li> <li>• Land Use</li> <li>• Meth./Metr. &amp; Opt. Eval.</li> </ul>			<ul style="list-style-type: none"> <li>• Toxics Policy /Prevention</li> <li>• Toxics Research</li> <li>• 2025 WIPs</li> <li>• WQ Stnds Attain/Mon.</li> </ul>				
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										5 <sup>th</sup> Cycle Starts		
2026	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
		People			Watersheds			Clean Water				
		<ul style="list-style-type: none"> <li>• Stewardship</li> <li>• Diversity</li> <li>• Stud. Env. Lit.</li> <li>• Env. Lit. Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Sust. Schools</li> <li>• Public Access</li> <li>• Local Leadership</li> </ul>		<ul style="list-style-type: none"> <li>• Healthy Watersheds</li> <li>• Tree Canopy</li> <li>• Forest Buffers</li> <li>• Climate Adaptn</li> <li>• Climate Mntr</li> <li>• Stream Health</li> <li>• Protected Lands</li> <li>• Land Use</li> <li>• Meth./Metr. &amp; Opt. Eval.</li> </ul>			<ul style="list-style-type: none"> <li>• Toxics Policy /Prevention</li> <li>• Toxics Research</li> <li>• 2025 WIPs</li> <li>• WQ Stnds Attain/Mon.</li> </ul>				

## CALENDAR OF COHORTS

### Benefits

- Develop stronger thematic alignment among cohorts
- Opportunity for outcomes to be discussed every year, if desired



# PROPOSED 4<sup>TH</sup> CYCLE SRS PROCESS

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Complete Outcome Review Summary

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Optional opportunity to meet with SRS Team to discuss process

7 weeks before QPM

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Practice presentation.  
Opportunity for cross-cohort collaboration

3 weeks before QPM

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## DUE: QPM MATERIALS

Provide Outcome Summary Review to MB. PowerPoint presentation optional.

2 weeks before QPM

6

## QUARTERLY PROGRESS MEETING

Lightning Talk abt outcome attainability & problem solving. Emphasize off-track outcomes in 2024  
On track outcomes may pass

7

## QPM FOLLOW-UP

Follow-up actions and decisions are distributed for outcome lead review

3 days after QPM

Op

## MB FOLLOW-UP

As needed, follow-up with the MB for a discussion on actions & decisions

2-4 weeks after QPM

Op

## MEET SET

Optional opportunity for Outcome Lead to meet with the Strategic Engagement Team.

after QPM

8

## REVISE & POST MS & WORKPLAN

Revise and post Management Strategy & Workplan. No formal submission to public or MB

12 weeks after QPM

Op

Optional Step

# PROPOSED SRS PROCESS – FOR MB MEMBERS

1

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180 days before QPM  
90 days before QPM

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Review MS, complete R/Y/G activity on LAP, & answer “Looking Back” questions.

3 months before QPM

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Logic analysis w. STAC  
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## SRS CHECK-IN MEETING

Optional opportunity to meet with SRS Team to discuss process

7 weeks before QPM

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Practice presentation.  
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Follow-up actions and decisions are distributed for outcome lead review

3 days after QPM

Op

## MB FOLLOW-UP

As needed, follow-up with the MB for a discussion on actions & decisions

2-4 weeks after QPM

Op

## MEET SET

Optional opportunity for Outcome Lead to meet with the Strategic Engagement Team.

after QPM

8

## REVISE & POST MS & WORKPLAN

Revise and post Management Strategy & Workplan. No formal submission to public or MB

12 weeks after QPM

Op

Optional Step

## FOR MB MEMBERS, WE BELIEVE THESE CHANGES WILL:

- Reduce the amount of materials that you are required to review for each outcome.
- Present a stronger theme between outcomes in each cohort, increasing opportunities for cross-outcome conversations as we move towards 2025.



# THANK YOU!

Jeff Lerner

Acting Branch Chief, Partnerships and  
Accountability

US EPA Chesapeake Bay Program Office

[Lerner.Jeffrey@epa.gov](mailto:Lerner.Jeffrey@epa.gov)

Sarah Brzezinski

Strategy Review System Coordinator

US EPA Chesapeake Bay Program Office

[Brzezinski.Sarah@EPA.gov](mailto:Brzezinski.Sarah@EPA.gov)

2023

