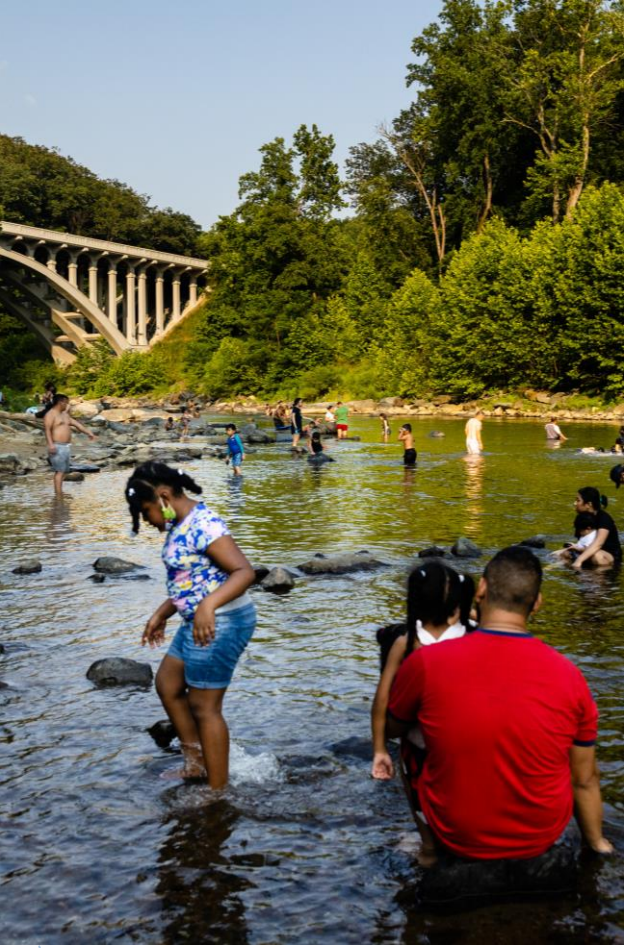
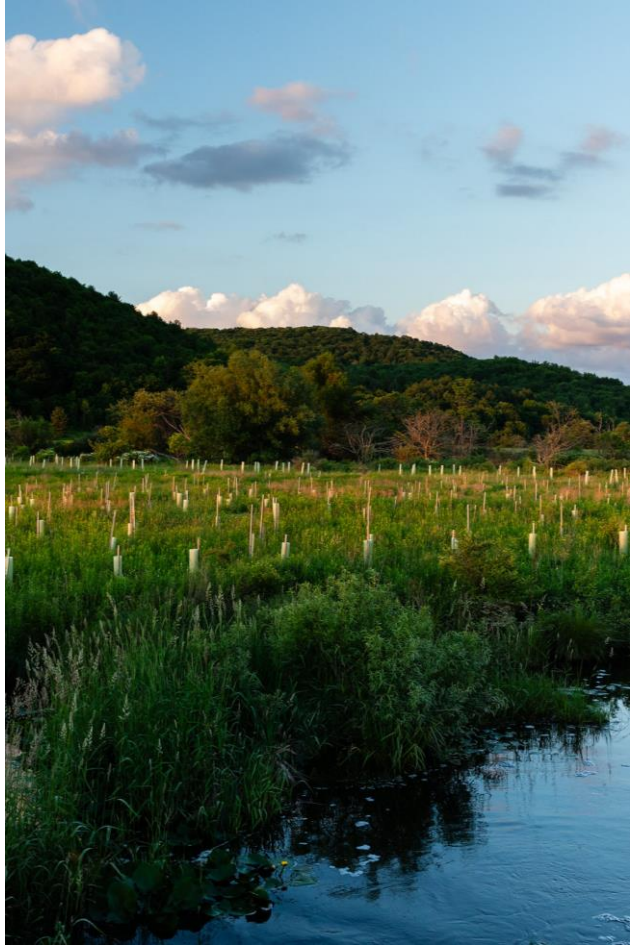



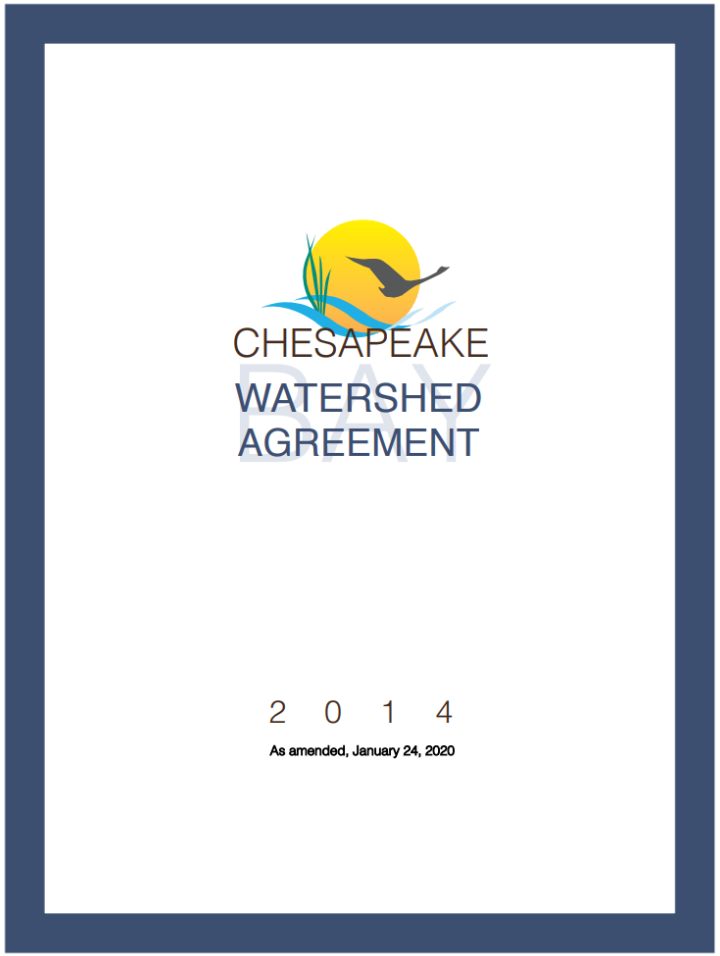
Strategy Review System

4th Cycle SRS Process Review &
QPM Preparations

April 2024

Chesapeake Bay Program
40 years of science, restoration and partnership

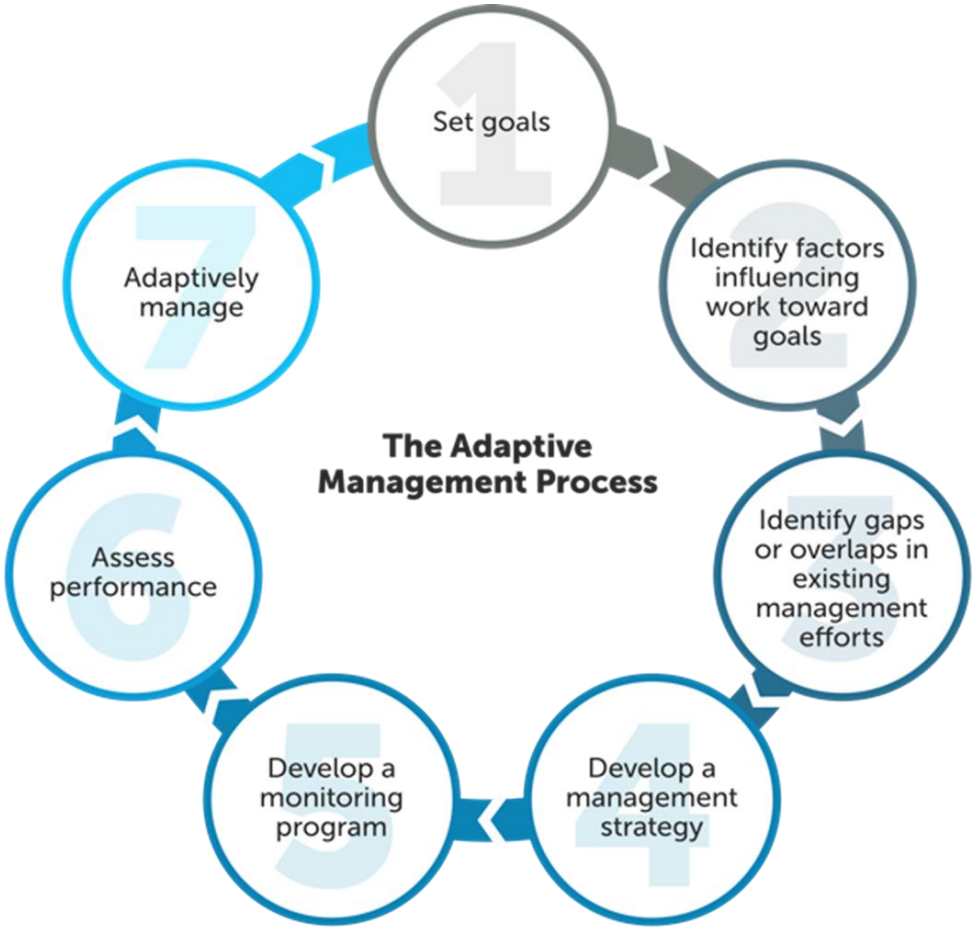
BAY PROGRAM & THE STRATEGY REVIEW SYSTEM (SRS)



2014 Watershed Agreement committed the Chesapeake Bay Program to

> "adaptively manage at all levels of the Partnership to foster continuous improvement."

THE STRATEGY REVIEW SYSTEM (SRS)



- CBP adopted the SRS in 2016
- Provides a structured, consistent process that applies adaptive management to our work.
- Acts as an accountability loop between the Management Board (MB) and the Goal Implementation Teams (GITs).

4th Cycle Calendar of Cohorts (2-year cycle w 4 cohorts)

- Outlook Uncertain
- Outlook Off Track

2023

Jan. Feb. Mar. Apr. **May** Jun. Jul. Aug. Sep. Oct. Nov. **Dec.**

Biennial Meeting

4th Cycle Starts

Living Resources

- SAV
- Wetlands
- Brook Trout
- Black Duck
- Oysters
- Bl. Crab Abundance
- Fish Passage
- Fish Habitat
- Forage Fish

2024

Jan. Feb. **Mar.** Apr. May **Jun.** Jul. Aug. **Sep.** Oct. Nov. **Dec.**

People

- Stewardship
- Diversity
- Stud. Env. Lit.
- Env. Lit. Planning
- Sust. Schools
- Public Access
- Local Leadership

Watersheds

- Healthy Watersheds
- Tree Canopy
- Forest Buffers
- Climate Adaptn
- Climate Mntr
- Stream Health
- Protected Lands
- Land Use Meth./Metr. & Opt. Eval.

Clean Water

- Toxics Policy /Prevention
- Toxics Research
- 2025 WIPs
- WQ Stnds Attain/Mon.

Living Resources

- SAV
- Wetlands
- Brook Trout
- Black Duck
- Oysters
- Bl. Crab Abundance
- Fish Passage
- Fish Habitat
- Forage Fish

2025

Jan. Feb. **Mar.** Apr. May **Jun.** Jul. Aug. **Sep.** Oct. Nov. **Dec.**

People

- Stewardship
- Diversity
- Stud. Env. Lit.
- Env. Lit. Planning
- Sust. Schools
- Public Access
- Local Leadership

Watersheds

- Healthy Watersheds
- Tree Canopy
- Forest Buffers
- Climate Adaptn
- Climate Mntr
- Stream Health
- Protected Lands
- Land Use Meth./Metr. & Opt. Eval.

Clean Water

- Toxics Policy /Prevention
- Toxics Research
- 2025 WIPs
- WQ Stnds Attain/Mon.

Biennial Meeting

5th Cycle Starts

Living Resources

- SAV
- Wetlands
- Brook Trout
- Black Duck
- Oysters
- Bl. Crab Abundance
- Fish Passage
- Fish Habitat
- Forage Fish

2026

Jan. Feb. **Mar.** Apr. May **Jun.** Jul. Aug. **Sep.** Oct. Nov. **Dec.**

People

- Stewardship
- Diversity
- Stud. Env. Lit.
- Env. Lit. Planning
- Sust. Schools
- Public Access
- Local Leadership

Watersheds

- Healthy Watersheds
- Tree Canopy
- Forest Buffers
- Climate Adaptn
- Climate Mntr
- Stream Health
- Protected Lands
- Land Use Meth./Metr. & Opt. Eval.

Clean Water

- Toxics Policy /Prevention
- Toxics Research
- 2025 WIPs
- WQ Stnds Attain/Mon.

Slide based on Reaching 2025 Report

4TH CYCLE SRS PROCESS

Revised 9/18/23

1 COHORT NOTIFICATION

Cohorts notified 180 & 90 days prior to QPM. Cohorts notify SRS Team of QPM plans: Pass, brief update, full QPM

180 & 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
Draft 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 QPM MATERIALS DUE

2 weeks before QPM

5a Complete & send Outcome Summary Review to MB.

5b Send optional PowerPoint presentation to MB.

6 QUARTERLY PROGRESS MEETING

MB Meeting: Outcome attainability & problem-solving presentation/ discussion. Emphasize off-track outcomes in 2024

Op QPM FOLLOW-UP

As needed, follow-up actions and decisions are distributed for outcome lead review

3 days after QPM

7 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

 # Step required every 2 years

 # As needed, step required

 # Step strongly recommended

Op Optional Step

Chesapeake Bay Program
BIENNIAL STRATEGY REVIEW SYSTEM
Outcome Review Summary

PUBLIC ACCESS SITE DEVELOPMENT

MARCH 2024 QUARTERLY PROGRESS MEETING

LOOKING BACK: LEARNING FROM THE LAST TWO YEARS

Celebrate Our Accomplishments & Best Practices

1. Since your last QPM, what key successes would you like to highlight to the Management Board?
   - The Public Access workgroup updated its membership list and has a new workgroup Chair who is a long-standing member and able to share the workgroup's history.
   - The workgroup's annual data collection continues to reflect progress towards achieving the 2025 public access goal.
   - The workgroup completed a Benefits and Barriers study to help identify factors that may be keeping people from using public access sites.

Evaluate Our Progress

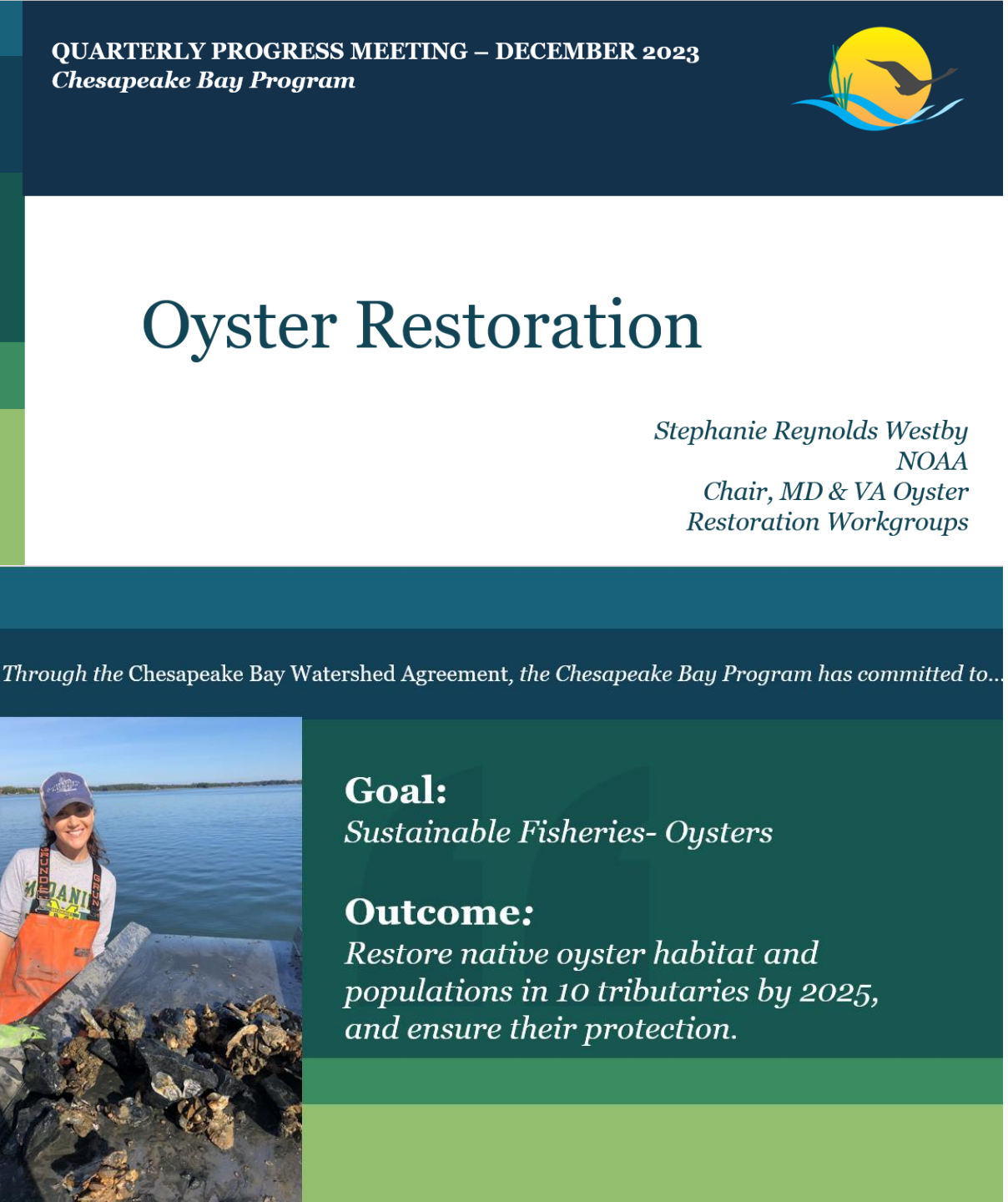
2. Are we, as a partnership, making progress at a rate that is necessary to achieve this outcome? Would you define our outlook as on course, off course, uncertain, or completed? Upon what basis are you forecasting this outlook?
   - The Public Access workgroup is on course. The long-term average number of sites has remained above the target needed to reach the 300-site goal.

3. How would you summarize your recent progress toward achieving your outcome (since your last QPM)? Would you characterize this progress as an increase, decrease, no change, or completed?
   - Overall, progress toward the public access goal has resulted in a steady increase in the number of sites. Maryland, Virginia and Pennsylvania have seen the biggest increases in access sites over the past ten years.
   - The addition of 11 new sites in 2022 is the fewest number of sites since the data calls began in 2011, but still marks an increase in recent progress for the outcome because we are currently averaging enough sites added to meet the goal. All states have experienced budget reductions and capacity constraints which have made it difficult to maintain current public access sites while focusing on building new access sites. A small number of sites have closed throughout the watershed. In future years closures will be considered as part of future inventory and data collection.

Lessons Learned

OUTCOME REVIEW SUMMARY

- Required
- Due by noon at least 2-weeks before the QPM
- Document brings together:
  - Reflections on the past two years
  - Analysis of how new information & lessons learned will impact partnership efforts to achieve the outcome, and
  - Recommendations for adaptations or course corrections



PRESENTATION

- Optional
- If used, due by noon at least 2-weeks before the QPM
- Template may be modified to meet workgroup needs
- Set of slides that:
  - Highlight key points from Outcome Review Summary
  - Support a GIT's request for the Management Board to take action or provide assistance

QUARTERLY PROGRESS MEETING (QPM)

- To **review progress** towards each outcome & discuss any needed adaptations to the partnerships' work to achieve the outcome.
- To hear from the workgroups and Goal Teams on their **findings, challenges, and/or requests for support**.
- Hybrid, but in person participation is recommended
- 4.5-6 hours duration

Chesapeake Bay Program
Science. Restoration. Partnership.

Toxics Contaminants Policy and Prevention Outcome

Management Strategy

2022–2024, v.4

An oily sheen covers the surface of the water near boats docked on Hoopers Island on the Eastern Shore in Dorchester County, Md. (Photo by Will Parson/Chesapeake Bay Program)

I. Introduction

The 2014 *Chesapeake Bay Watershed Agreement* includes a goal to ensure that the Bay and its rivers are free of effects of toxic contaminants on living resources and human health. There are two associated outcomes are (1) research and (2) policy and prevention. Toxic contaminants that enter the Chesapeake Bay and its watershed harm aquatic life, compromise the economic value of its living resources and present risk to human health. In the 2014 *Chesapeake Bay Watershed Agreement*, the Chesapeake Bay Program identified a desired outcome to "Continually improve practices and controls that reduce and prevent the effects of toxic contaminants below levels that harm aquatic systems and humans." Because there are many contaminants of potential concern, the partners decided to identify a group of contaminants—polychlorinated biphenyls (PCBs)—for which to begin to develop a comprehensive strategy to reduce the amount that enters the Bay and watershed. PCBs are chemicals that accumulate in fish and are most often the primary reason for fish consumption advisories in the Chesapeake Bay. The outcome statement went on, therefore, to include "Build on existing programs to reduce the amount and effects of PCBs in the Bay and watershed." This strategy identifies management approaches that use regulatory and non-regulatory programs to reduce the amount of PCBs entering the Bay and its watershed.

MANAGEMENT STRATEGY

- Required
- Due 12 weeks after the QPM
- Long-term strategy
- Review & revise existing document to ensure it accurately represents the group's current logic and direction in working toward the outcome
  - Not intended to be a wholesale re-write

EXAMPLE OUTCOME
SRS 4TH CYCLE: 2024-2025 WORK PLAN

OUTCOME:

NOTE: Above, copy the outcome language from the 2014 Watershed Agreement. Example: By 2025, add 300 new public access sites, with a strong emphasis on providing opportunities for boating, swimming and fishing, where feasible.

Long-term Target:

NOTE: Above, write the metric for success of Outcome. Example: 300 new public access sites by 2025

Two-year Target:

NOTE: Above, write the increment of metric for success. Example: The Public Access Workgroup has set an internal target, called a milestone, of 20 new public access sites annually. This internal milestone is intended to establish a system for tracking progress relative to regular increments of the long-term outcome of 300 new sites and is not meant to be a target itself.

MANAGEMENT APPROACH 1: Partnership coordination - develop shared stream restoration monitoring protocols and technical guidelines.

Action #	Description of Step	Responsible Party or Parties	Geographic Location	Expected Timeline
1.1	Form an action team to identify commonalities among existing protocols	Volunteers XYZ Workgroup members & jurisdiction representatives	Watershed-wide	Winter 2024 – Summer 2024
1.2	Develop a STAC Workshop proposal to engage scientific experts to identify best practices & identify monitoring priorities from diverse stakeholders. If funded, convene diverse stakeholders, host workshop, & finalize workshop report	XYZ Workgroup Chairs, Coordinator, Staffer & Workgroup members STAC Workshop Planning Committee	Watershed-wide	Winter 2024 Summer 2024 – Spring 2025
1.3	Collaborate on & shared stream restoration monitoring protocols and technical guidelines.	XYZ Workgroup Chairs, Coordinator, Staffer, & Workgroup members (including jurisdiction representatives)	Watershed-wide	Fall 2024
1.4	Update ABC stream restoration database. Analyze reported data.	XYZ Workgroup Chairs, Coordinator, & Staffer	Watershed-wide	Spring 2025
1.5	Convene XYZ workgroup meeting to reflect on shared protocols & yr 1 data.	XYZ Workgroup	Watershed-wide	Fall 2025
How do we expect the action to fill the priority factor or gap? What do you expect to happen when the action is completed?		**What are the goals or metrics you will use to determine the impact of your action?**	**How will we collect and assess the data that we want to monitor and how will we use the data?**	**How will we communicate the results?**
Stream restoration monitoring protocols and technical guidelines are inconsistent between individual jurisdictions, federal agencies and NGOs. Establishing consistent, shared protocols and guidelines will enhance watershed-wide monitoring efforts and for improve our understanding of the effectiveness of stream restoration efforts.		Number of partners who adopt & utilize shared protocols & guidelines. Improvement to information collected in ABC stream restoration database, and improved understanding of stream restoration effectiveness.	Annually updated ABC stream restoration database Use data to assess number, impact & geographic spread of stream restoration projects. Apply learnings to BMP development.	• STAC workshop report • Presentation of findings to MB • Leverage trusted stakeholders w/in jurisdictions

WORK PLAN

- Required
- Due 12 weeks after the QPM
- Short term plan
- Builds on ORS & MS by identifying actions the workgroup will take in the next 2-years to manage or respond to factors influencing outcome attainability and gaps in management efforts

HEALTHY WATERSHEDS COHORT – 4TH CYCLE PLANS

OUTCOMES	Status (per Ches. Progress)	Complete SRS Process	Year 1 QPM	Year 2 QPM
Healthy Watersheds	Uncertain	Year 1	Full Update	
Stream Health	On Course	Year 1	Full Update	
Tree Canopy	Off Course	Year 2	Brief Update	
Forest Buffers	Off Course	Year 2	Brief Update	
LUMM & LUOE	On Course	Year 2	Brief Update	
Climate Adaptation	Off Course	Year 2	Pass	
Climate Monitoring and Assessment	On Course	Year 2	Pass	
Protected Lands	On Course	Year 2	Pass	

CLEAN WATER COHORT – 4TH CYCLE PLANS

OUTCOMES	Status (per Ches. Progress)	Complete SRS Process	Year 1 QPM	Year 2 QPM
Toxic Contaminants Research	On Course	Year __		
Toxic Contaminants Policy and Prevention	Off Course	Year __		
Watershed Implementation Plans (WIP) – 2025	Off Course	Year __		
Water Quality Standards Attainment and Monitoring	On Course	Year __		

THANK YOU!

Sarah Brzezinski

Strategy Review System Coordinator

US EPA Chesapeake Bay Program Office

Brzezinski.Sarah@EPA.gov

2024

Chesapeake Bay Program
40 years of science, restoration and partnership.

All photos by Will Parson/Chesapeake Bay Program

2024 HEALTHY WATERSHEDS COHORT

Key Meeting or Product	Timeline	Date*
SRS Check-In Meeting	7 weeks pre-QPM	04/30/2024 1:00PM – 3:00 PM
C/S Dry Run with STAR	3-4 weeks pre-QPM	5/16/2024 11:30AM – 1:30PM
QPM Materials Due	Noon, 2 weeks pre-QPM	5/30/2024 Due by Noon
QUARTERLY PROGRESS MEETING	**QPM**	**6/13/2024** **10:00AM – 4:00PM**
Revise & Post MS & Work Plan	12 weeks post-QPM	9/5/2024 Due by Noon

*As soon as possible, please let SRS Coordinator Sarah Brzezinski know if you have a conflict for a date listed above.

2024 CLEAN WATER COHORT – TENTATIVE DATES

Key Meeting or Product	Timeline	Date*
SRS Check-In Meeting	7 weeks pre-QPM	7/23/2024 1:00PM – 3:00 PM
C/S Dry Run with STAR	3-4 weeks pre-QPM	8/15/2024 10:30AM – 1:00PM
QPM Materials Due	Noon, 2 weeks pre-QPM	8/29/2024 Due by Noon
QUARTERLY PROGRESS MEETING	**QPM**	**9/12/2024** **10:00AM – 4:00PM**
Revise & Post MS & Work Plan	12 weeks post-QPM	12/5/2024 Due by Noon