

The Chesapeake Bay Program Biennial Strategy Review System

Table of Contents

Introduction.....2

Biennial Strategy Review System Schedule.....3

Two-Day Biennial Review Meetings Description.....5

Quarterly Progress Meetings Description7

Introduction

The Chesapeake Bay Program's **Biennial Strategy Review System (SRS)** is the adaptive management-based review process by which the Partnership seeks to meet the following *Chesapeake Bay Watershed Agreement* commitment:

Goal Implementation Teams will re-evaluate biennially and update [management] strategies as necessary, with attention to changing environmental and economic conditions. Partners may identify policy changes to address these conditions and minimize obstacles to achieve the Outcomes.

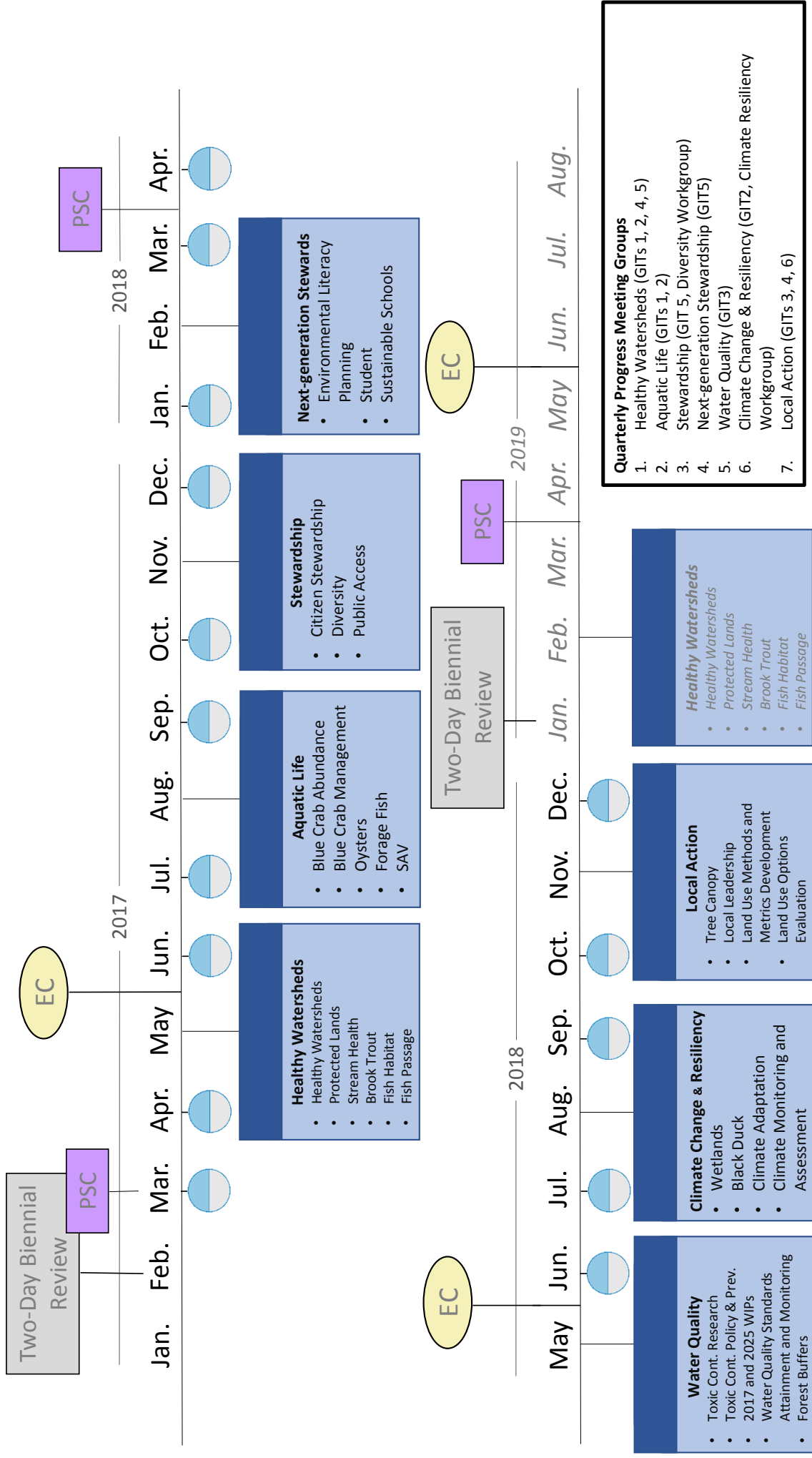
The SRS is a two-year process meant to improve our effectiveness in achieving our Goals and Outcomes. During this process, the partnership will review its progress toward the *Chesapeake Bay Watershed Agreement*; identify the management approaches and actions that are or are not working; consider scientific, fiscal, and policy developments; adjust our Management Strategies and Two-Year Work Plans as appropriate; and develop the next set of Two-Year Work Plans. The system is not intended to focus on where we are falling short, but on how we can work together and support each other to improve our collective success.

The SRS begins with a **Two-Day Biennial Review Meeting** designed to provide: (1) a broad review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the previous two years, and (2) an identification of issues and developments in the scientific, fiscal, and policy fields that could impact Goal and Outcome achievement. Issues that are identified during the Two-Day Biennial Review Meeting will inform subsequent and more detailed **Quarterly Progress Meetings**: meetings of the Management Board during which progress toward individual Outcomes is reviewed, necessary changes to management approaches and/or actions are identified, and, input given to support revisions to new Two-Year Work Plans are approved. Each Outcome will receive individual attention from the Management Board at least once during this two-year review schedule. The entire SRS process will be repeated every two years.

Much of the work that supports the SRS will be conducted by the Management Board and Goal Implementation Teams (GITs) during Quarterly Progress Meetings. However, the SRS is not intended to exclude other groups. To the contrary, it is an inclusive process open to all. In particular, the flow of information that will occur between the Management Board and the Principals' Staff Committee (PSC) throughout this process will need to be a two-way street. Results and actions from the Two-Day Biennial Review Meeting and Quarterly Progress Meetings will be regularly provided to the PSC, and resulting feedback from the PSC will be shared with the Management Board, GITs, and other groups as appropriate.

The remainder of this document includes descriptions of the critical components of the SRS. It is important to view this information as a work in progress. Indeed, the current version of the SRS is the result of many conversations with many partners over many months, all of whom have devoted much time and effort to making it work. While what follows is not perfect, our goal was not to design a perfect process, but to design a process that was good enough to get started—and we have done that. We pledge to continually review, solicit input, and improve this process as we move forward.

2017-2018 Biennial Strategy Review System Schedule



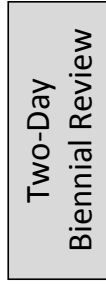
2017-2018 Biennial Strategy Review System Schedule: Legend



Quarterly Progress Meetings: Meetings of the Management Board during which progress toward individual Outcomes is reviewed, necessary changes to management approaches and/or actions are identified, and, where appropriate, new Two-Year Work Plans are approved.



Interim Management Board Meetings: Regular meetings of the Management Board. High-priority issues—whether newly identified or previously identified during a Quarterly Progress Meeting—should be addressed here, as needed.



Two-Day Biennial Review Meeting: A high-level retrospective review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the previous two years and an identification of issues and developments in the scientific, fiscal, and policy fields that could impact Goal and Outcome achievement.



Principals' Staff Committee Meeting: Regular meetings of the Principals' Staff Committee during which members can provide their input on significant changes or shifts in strategy and use the results of the Biennial Strategy Review System to prepare a report on implementation progress for the Executive Council.



Executive Council Meeting: Regular meetings of the Executive Council during which members can offer concurrence and partner commitment to significant changes or strategy shifts, as needed.

Two-Day Biennial Review Meetings

Purpose: To identify issues and developments in the scientific, fiscal, and policy fields, and in the implementation of our management approaches, that the Chesapeake Bay Program partnership should consider in adaptively managing its work over the next two years. This high-level review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* will improve our effectiveness in achieving our Goals and Outcomes. This meeting will be led by the Management Board and will directly support the needs of the Principals' Staff Committee as articulated in the *Chesapeake Bay Watershed Agreement*.

When: A two-day meeting held at the beginning of each biennial review cycle.

Who: An open meeting with emphasis on attendance by the Management Board, Outcome Leads (often Goal Implementation Team or Workgroup Leads), Advisory Committee Chairs, and the Scientific, Technical Assessment & Reporting (STAR) Team.

Guiding Questions:

1. *In general*, are we successfully implementing our Management Strategies and Two-Year Work Plans at a pace that is reasonably likely to achieve our Outcomes? Where are we succeeding? Where are we falling short?
 2. Have external, influencing factors (e.g., scientific understanding or technological developments; fiscal resources or finance options; or legal, regulatory, or policy boundaries) sufficiently changed to warrant revisions to our management approaches and/or actions?
 3. Have external program evaluations or reviews identified partnership action(s) that are needed to foster progress toward our Outcomes?
 4. What opportunities or obstacles exist to improve or hinder cross-team collaboration or to yield cross-Outcome benefits?
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Objectives:

1. Identify lessons learned from a broad retrospective review of where and why we have and have not made progress toward the *Chesapeake Bay Watershed Agreement* over the past two years.
 2. Identify observed and anticipated issues and developments in the scientific, fiscal, and policy fields that the Management Board and Goal Implementation Teams should consider in fostering progress toward and/or modifying our management approaches and/or actions to achieve the *Chesapeake Bay Watershed Agreement* over the next two years.
 3. Use the results of external program evaluations or reviews to identify partnership actions that would foster progress toward our Outcomes.
 4. Facilitate the implementation of cross-team activities that will accelerate progress toward or otherwise benefit multiple Outcomes.
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Inputs:

1. Our Performance. In what *general* areas are we ahead of schedule, on schedule, or behind schedule in making progress toward the *Chesapeake Bay Watershed Agreement*? What common factors are contributing to our being ahead of or behind schedule?
 2. External Factors. What external, influencing factors (e.g., scientific understanding or technological developments; fiscal resources or finance options; or legal, regulatory, or policy boundaries) have recently or will soon change to warrant revisions to our management approaches and/or actions? Will our anticipated or desired achievements have their intended effects, or has our understanding of how systems will respond to our work changed?
 3. Appropriate Responses. Based on the information above, what issues or themes should we keep in mind when evaluating our progress and identifying possible revisions to our management approaches and/or actions over the next two years?
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Outputs:

1. A shared understanding of (a) effective management approaches and/or actions that should be replicated, (b) ineffective management approaches and/or actions that should be avoided, and (c) ideas and innovations that should be incorporated into management approaches and/or actions.
 2. Recommendations of scientific, fiscal, and policy developments that the Management Board and Goal Implementation Teams should consider in their review of assumptions around the factors influencing our progress and the prioritization thereof and in their modification of management approaches and/or actions, as appropriate.
 3. Recommendations of changes to resource allocations.
 4. Recommendations to guide program evaluations or reviews.
 5. Recommendations of topics that warrant further discussion at Quarterly Progress Meetings.
 6. Information to guide the completion of the PSC's report to the Chesapeake Executive Council on implementation of Management Strategies as required by the Watershed Agreement.
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Process: The first Two-Day Biennial Review Meeting will occur on Wednesday and Thursday, February 8 and 9, 2017, in Cambridge, Maryland. This meeting will differ from subsequent Two-Day Biennial Review Meetings (to take place in 2019, 2021, etc.), in the respect that previous Quarterly Progress Meetings will not have taken place, the results of which would have otherwise informed our understanding of what has and has not worked in the implementation of our efforts to achieve the *Chesapeake Bay Watershed Agreement*. Future Two-Day Biennial Review Meetings will provide a greater opportunity to explore lessons learned.

Quarterly Progress Meetings

Purpose: To improve our success in achieving individual *Chesapeake Bay Watershed Agreement* commitments through (1) the review of progress toward individual Outcomes, (2) the application of opportunities and insights identified during the preceding Two-Day Biennial Review Meeting or elsewhere, and (3) the resulting implementation of necessary changes to our management approaches and/or actions. The discussions and decisions that arise from each Quarterly Progress Meeting will inform whether Goal Implementation Teams (GITs) need to draft and seek approval of new Two-Year Work Plans. As a result, Outcomes will no longer be on one two-year revision cycle. Instead, small collections of Outcomes—identified in the Biennial Strategy Review System schedule—will be on their own two-year revision cycle, with time marked by a collection’s recurring Quarterly Progress Meetings.

When: Quarterly meetings of the Management Board.

Who: The Management Board, Outcome Leads (often Goal Implementation Team or Workgroup Leads), Advisory Committee Chairs, and invited outside experts.

Guiding Questions:

1. *At the individual Outcome level*, are we successfully implementing our Management Strategies and Two-Year Work Plans at a pace that is reasonably likely to achieve our Outcomes?
 2. Which management approaches and/or actions have or will play the biggest role in our progress? What barriers must be removed to allow for critical future actions to be taken?
 3. Have our assumptions about our Outcomes changed? Do our management approaches and/or actions warrant revision?
 4. What opportunities or obstacles exist to improve or hinder cross-team collaboration or to yield cross-Outcome benefits?
 5. What is needed from the Management Board to continue or accelerate our progress?
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Objectives:

1. Assess the implementation of our management approaches and actions. Are we doing what we said we would do? Are our actions having the desired effect?
 2. Acknowledge our assumptions and update our understanding of the system. What’s working? What’s not working? What new developments have occurred since our work began?
 3. Identify necessary adjustments to our work. What revisions to our management approaches and/or actions are warranted according to current assessments?
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Inputs:

1. Summaries of our Outcomes, the progress that has been made thus far, and whether we are on track to achieve these Outcomes by any applicable deadlines.

2. Illustrations of the logic behind our work to achieve our Outcomes, including the status of our management approaches and actions and the indication of the approaches and/or actions that have or will play the biggest role in making progress.
 3. Compelling narratives that outline our current understanding of our management approaches, the challenges faced, the adaptations recommended, and direct asks of the Management Board.
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Outputs:

1. An updated understanding of the system.
 - a. Identification of new assumptions, new influencing factors, and new partners in our work.
 - b. Identification of new expectations and uncertainties.
 2. Recommendations for Management Strategy and/or Two-Year Work Plan revision and/or changes in resource allocation (which includes any needed cross-team or external program coordination).
 3. Within 90 days, a revised Two-Year Work Plan.
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Process:

1. Four Weeks Before a Quarterly Progress Meeting: Outcome Leads submit completed Quarterly Progress Meeting Templates and Logic Tables to the Enhancing Partnering, Leadership, and Management GIT (GIT6). GIT6 reviews materials and works with Outcome Leads as needed to address issues or answer questions.
2. Two Weeks Before a Quarterly Progress Meeting: GIT6 submits completed Quarterly Progress Meeting Templates and Logic Tables (including reviewer comments, as needed) to Management Board, Advisory Committees, and invited outside experts.
3. During a Quarterly Progress Meeting: Outcome Leads use the template provided to give Discussion and Analysis Presentations to the Management Board. Management Board Chair leads a discussion based on the following questions: (1) What are the most important short-term actions that can be implemented to accelerate progress toward Outcomes? (2) What management actions should be considered for future Two-Year Work Plans? (3) Should any Outcome modifications be recommended to the PSC?
4. After a Quarterly Progress Meeting: Management Board Coordinator and Staffers, Outcome Leads, and GIT6 Chair finalize Action Items. Responses to Action Items (including, where appropriate, revised Two-Year Work Plans) are to be submitted to the Management Board at the next Quarterly Progress Meeting (or within 90 days).

Note: Each of the *Chesapeake Bay Watershed Agreement* Outcomes will be reviewed and discussed at one Quarterly Progress Meeting during the two-year Biennial Strategy Review System schedule. However, if high-priority issues arise, Outcome Leads should be sure to bring these items to the immediate attention of the Management Board (rather than waiting until their next Quarterly Progress Meeting).