

Ad Hoc Workgroup on Management Strategy Workplan Template & Timeline

June 16, 2015

Recommendations

Timeline

- Add GIT Chairs meeting in Aug./Sept. – each GIT will bring at least one discussion draft to compare across goal teams, discuss process and level of detail, identify challenges, etc.
- Add “Preliminary drafts due Nov 1” - based on PSC direction

Workplan Template

- Add dates to header. E.g. “Effective date: 2015-2017”
- Add a column for “Factors” to help tie Actions to Factors Influencing (and show the logic)
- Change funding column to “Identified *Estimated* Funding”
- Funding columns should be projections of roll ups for all partner contributions by action. Emphasize accuracy over precision; fine to have budget in a certain range (precision is wasted effort).
- Develop a second “appendix” spreadsheet template to show Partner (and NGO) contributions
- Change “output/result” column to “Performance Target”; add explanatory language in red. (performance target is a more flexible term; allows us to set target as a range)
- Separate GIT/workgroup actions from partner actions

Workplan Process

- Agreed to three stage development process:
 1. Initial brainstorm – What is currently underway?; Develop a wish list of actions for next two years (without regard to cost/funding); realistic to complete (by Sept.)
 2. Develop matrix (using revised template) – include actions, factors, performance target, participants, completion date; conduct cross-outcome assessments (following Decision Framework guidance).
 3. Identify costs and funding
- Comprehensive Scope - Agreed that workplans should include both current efforts and “new” management approaches.
- Stretch actions/approaches – should include them if there is a solid commitment to finding funds. Funding gaps can be motivational and help explain why we couldn’t take some actions.
- Funding gaps – if an action cannot be funded, it should be rolled into the next action plan
- Include FTEs? – Only if required. Need direction from OMB/CEQ (at a later date)
- Cross-GIT analysis – conduct an exercise to identify actions that may have an effect on multiple outcomes.
- Public involvement – Build off management strategy outreach. Continue outreach to groups engaged in MS development; proactively contact them (mailing lists); open meetings; updates on CBP comm products
- Make clear decisions on expectations and stick to hard and fast deadlines – iterative process creates fatigue. Think through and clearly define the process; be