

The Chesapeake Bay Program Biennial Strategy Review System:
A Guide to Your Quarterly Progress Meeting

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Executive Summary

The Chesapeake Bay Program's Biennial Strategy Review System is a two-year process meant to improve our effectiveness in achieving our Goals and Outcomes. During this process, the partnership will review our progress toward the *Chesapeake Bay Watershed Agreement*; identify the management approaches 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 our next set of Two-Year Work Plans. The system is not intended to focus solely on where we are falling short, but rather on how we can work together and support each other to improve our collective success.

Each Quarterly Progress Meeting is meant to improve our success in meeting the Watershed Agreement through:

- The collective review of our progress toward individual Outcomes,
- The application of new opportunities and understandings as identified during the most recent Biennial Review Meeting and elsewhere, and
- The resulting implementation of any necessary adaptations to current or next-round Management Strategies and/or Two-Year Work Plans¹.

This document describes the process that will help us achieve these goals. Through this process, the Management Board and Goal Implementation Teams (GITs) will work together to:

- Continually improve our ability to make better decisions through the use of the PSC-approved Adaptive Management Decision Framework,
- Describe our progress toward an Outcome,
- Identify and explain the actions that have or will play the biggest role in making progress, and
- Identify and explain how any knowledge we have gained or changes that have occurred since our Management Strategies and Work Plans were developed have or could change our logic and assumptions about an Outcome.

This document describes the process that all GITs will follow in preparation for their Quarterly Progress Meetings. This process is made up of **three key steps**:

- Step 1. **Summarize your Outcome**, the progress you have made thus far, and whether we are on track to achieve this Outcome by the identified date.
- Step 2. **Explain the logic behind your work toward an Outcome**, indicate the status of your management actions, and denote which actions have or will play the biggest role in making progress.
- Step 3: **Craft a compelling narrative** that outlines your current understanding of your management approach, the challenges you may face, the adaptations you may recommend, and the direct asks you may have of the Management Board.

These steps are described in more detail in the pages that follow.

¹ A Quarterly Progress Meeting's discussions and decisions will inform whether a Goal Implementation Team will need to draft and present a new Two-Year Work Plan at the following Quarterly Progress Meeting. As a result, Outcomes will no longer be on the same two-year revision cycle. Instead, each Outcome will be on its own two-year revision cycle, which will begin and end with its biennial Quarterly Progress Meeting.

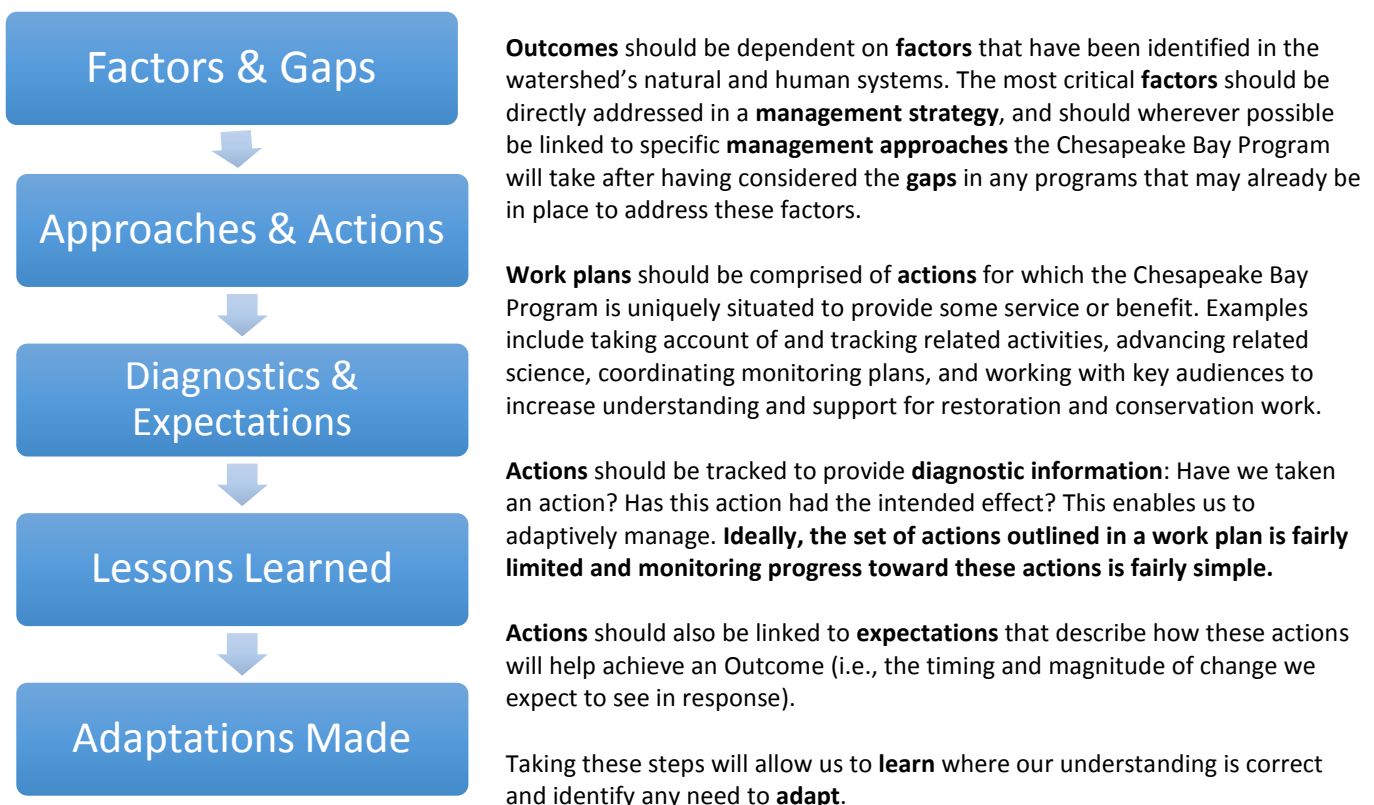
Introduction

The Principals' Staff Committee-approved Adaptive Management Decision Framework (Appendix A) guides our work and ensures the activities that support the achievement of Outcomes are focused on the unique contributions the Chesapeake Bay Program can make. The Decision Framework asks the following questions:

- (1) What are our assumptions?
- (2) Are we doing what we said we would do?
- (3) Are our actions having the expected effect?
- (4) How should we adapt?

When these questions are used in the context of the Biennial Strategy Review System, they allow all parties to follow a clear logic process, learn along the way, and put data-based refinements of our management strategies in place. In other words, the Biennial Strategy Review System allows all partners to consider our management strategies and work plans, assess the progress that has been made, and use what we have learned to determine whether those strategies and work plans are the most effective course of action.

The following statements summarize the Decision Framework in the context of our work toward the Watershed Agreement:



Using the Decision Framework in this way will ensure (1) the appropriate consideration of influencing factors and the subsequent connection of those factors to actions identified in management strategies and work plans, (2) a consistency among work plans in identifying only those actions assigned to the Chesapeake Bay Program, and (3) a deeper understanding and implementation of adaptive management.

Quarterly Progress Meeting Template

To be prepared by an Outcome's lead GIT in advance of its Quarterly Progress Meeting

Step 1: Summarize your outcome.

Outcome:

Insert your Outcome as it appears in the *Chesapeake Bay Watershed Agreement*.

Lead and Supporting Goal Implementation Teams (GITs):

Insert the name of your GIT. Indicate whether other GITs are working with you to achieve this Outcome.

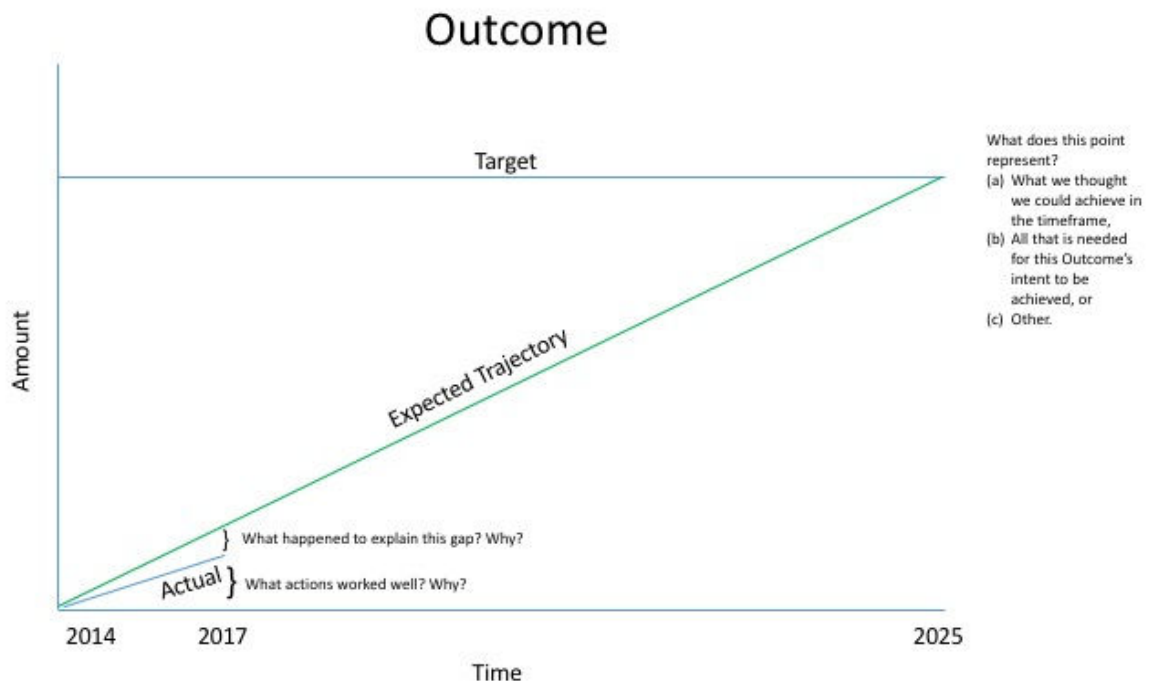
Participating Partners:

List the partners participating in your Management Strategy and Two-Year Work Plan. Include federal agencies, state agencies, academic institutions, and nongovernmental organizations where possible. This list can be copied from ChesapeakeProgress.com.

Progress:

Insert a brief summary of your progress toward the Outcome. Indicate whether we are on track to achieve the Outcome.

If appropriate, your summary can include text, chart(s) and/or map(s) from ChesapeakeProgress.com and/or be communicated through an adapted version of the graphic below.



Step 2: Explain the logic behind your work toward an Outcome.

The following logic table (available as an Excel spreadsheet) should be used to explain the reasoning behind your work toward an Outcome. The table allows you to indicate the status of your management actions and denote which actions have or will play the biggest role in making progress.

Some Management Strategies and Work Plans will not immediately or easily fit into this analytical format. However, **all GITs should complete columns one, two, three, four, five and nine** to bring consistency to and heighten the utility of these guiding documents. The remaining columns are recommended for those who are able to complete them.

Factor	Gap	Management Approach	Work Plan Action	Responsible Party	How do you track whether action is complete?	Expected Response	Lesson(s) Learned	Adaptation(s) Made or Recommended	Critical Actions <i>Indicate with an X.</i>

The instructions below should be used to complete the table. An example table is available in Appendix C.

- Required:** In the column labeled **Factor**, list the significant factors (both positive and negative) that will or could affect your progress toward an Outcome. Consult our Guide to Influencing Factors (Appendix B) to ensure your list is reasonably comprehensive and has considered human and natural systems. Include any factors that were not mentioned in your original Management Strategy or Work Plan but should be addressed in any revised course of action.
- Required:** In the column labeled **Gap**, list any existing gaps left by those programs that may already be in place to address your influencing factors. These gaps should help determine the actions that should be taken by the Chesapeake Bay Program.
- Required:** In the columns labeled **Management Approach** and **Work Plan Action**, list the approaches and actions you are taking to manage influencing factors and make progress toward an Outcome. Include those approaches and/or actions that may not be linked to an influencing factor.
- Required:** In the column labeled **Responsible Party**, identify the parties responsible for your management actions and indicate which are the primary responsibility of the Chesapeake Bay Program.
- Required:** In the column labeled **Critical Actions**, indicate which management actions have or will play the biggest role in making progress.
- Optional:** In the column labeled **How do you track whether action is complete?**, list the metric, process or information that will be used to track whether your management actions have been completed.
- Optional:** In the column labeled **Expected Response**, list the expected effects of your management actions. Include the timing and magnitude of any expected changes and whether these changes have occurred.
- Optional:** In the column labeled **Lesson(s) Learned**, list any lessons you have learned related to your management actions.
- Optional:** In the column labeled **Adaptation(s) Made or Recommended**, list any changes you have or would recommend be made to your management actions.
- Required:** Use color to indicate the status of your approaches and actions: a **green** row indicates an action has been completed or is moving forward as planned; a **yellow** row indicates an action is underway and/or has encountered minor hiccups; a **red** row indicates an action has not been taken or has encountered a serious barrier.

Step 3: Craft a compelling narrative.

While the information included in Steps 1 and 2 is meant to explain the work you are doing and support the analysis that is needed to adaptively manage, the presentation you bring to your Quarterly Progress Meeting should be summarized in a compelling narrative. This narrative will allow you to:

- Summarize your Outcome, the progress you have made thus far, and whether we are on track to achieve this Outcome by the identified date.
- Explain the logic behind your work toward an Outcome, indicate the status of your management actions, and denote which actions have or will play the biggest role in making progress.
- Outline your current understanding of your management approach, the challenges you may face, the adaptations you may recommend, and the direct asks you may have of the Management Board.

We recommend answering the following Adaptive Management-inspired questions in writing **and** using the “And, But, Therefore” story structure to present these points to the Management Board. Our Discussion and Analysis Presentation Template (.PPT) should be adapted to fit your style and needs.

What are our assumptions?

- (1) What original assumptions did we make in our Management Strategy that we felt were important to success?
 - a. What were your “Factors Influencing Success” originally identified in the Management Strategy?
 - b. What did you originally identify in the Management Strategy as gaps in existing programs that addressed those factors?
 - c. What were the “Management Approaches” you chose in your strategy and workplan to address those gaps?

Are we doing what we said we would do?

- (2) Are you on track to achieve your Outcome by the identified date?
 - a. What is your target? What does this target represent? (e.g., the achievement we believed could be made within a particular timeframe; the achievement we believed would be necessary for an Outcome’s intent to be satisfied; etc.)?
 - b. What is your anticipated deadline? What is your anticipated trajectory?
 - c. What actual progress has been made thus far?
 - d. What could explain any existing gap(s) between your actual progress and anticipated trajectory?
- (3) Which of your management actions have been the most critical to your progress thus far? Why? Indicate which influencing factors these actions were meant to manage.
- (4) Which of your management actions will be the most critical to your progress in the future? Why? What barriers must be removed—and how, and by whom—to allow these actions to be taken? Indicate which influencing factors these actions will be meant to manage.

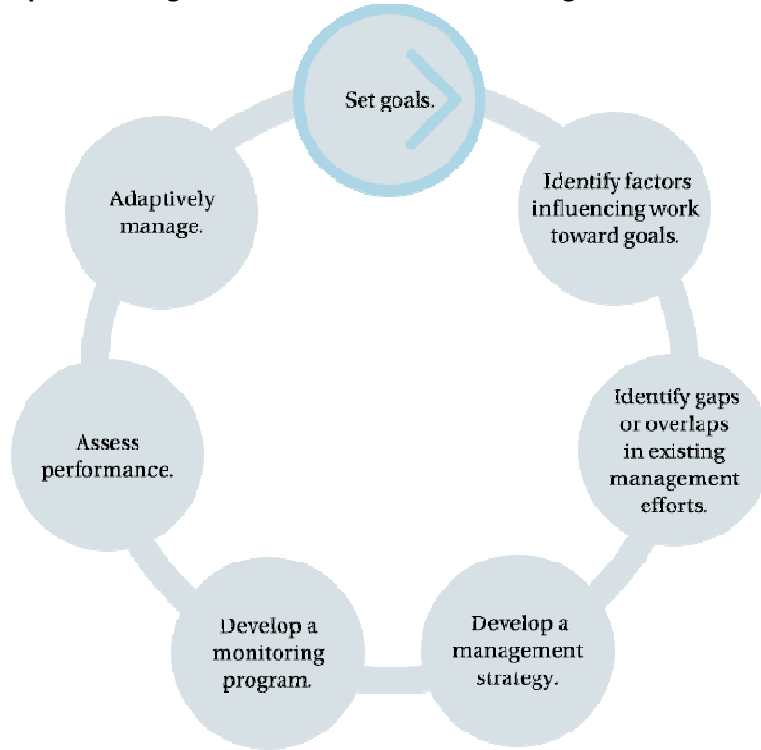
Are our actions having the expected effect?

- (5) What scientific, fiscal or policy-related developments or lessons learned (if any) have changed your logic or assumptions (e.g., your recommended measure of progress; the factors you believe influence your ability to succeed; or the management actions you recommend taking) about your Outcome?

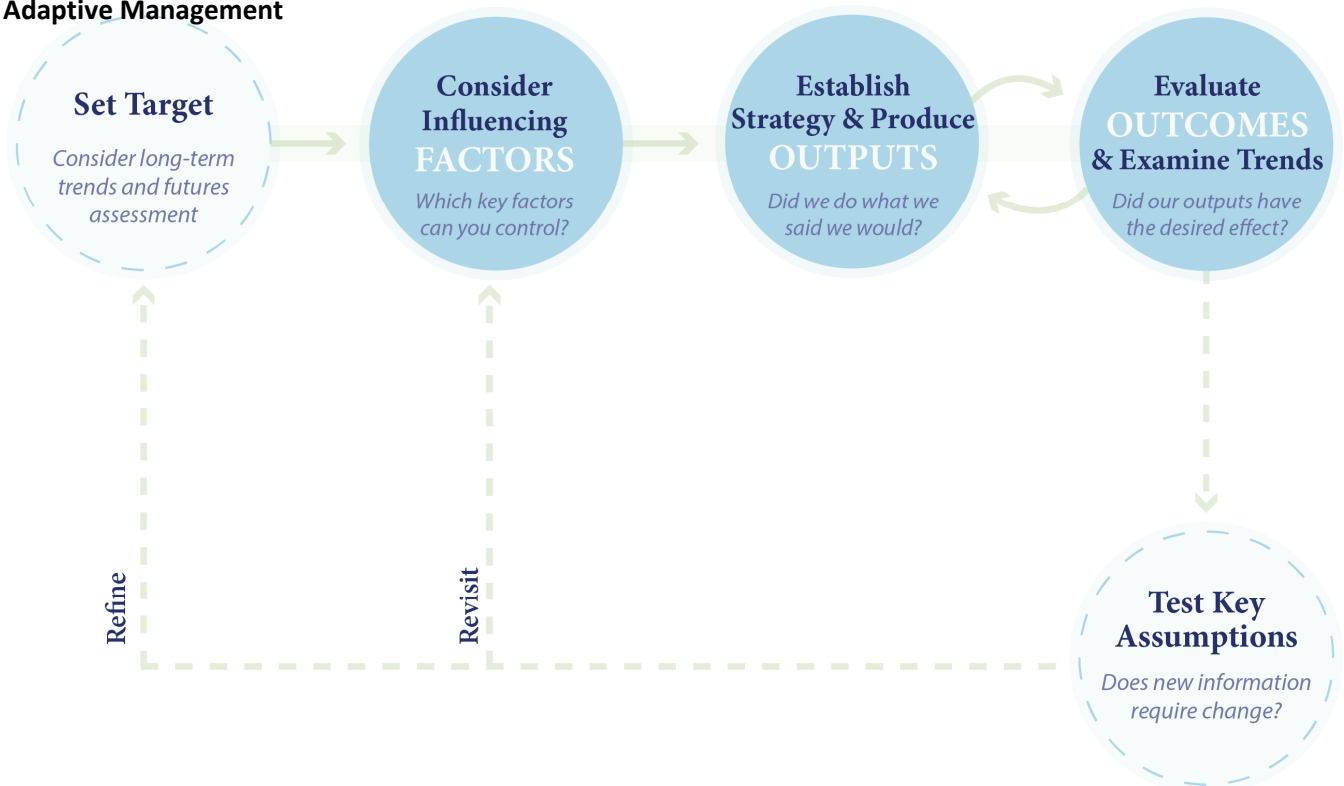
How should we adapt?

- (6) What (if anything) would you recommend changing about your management approach at this time? Will these changes lead you to add, edit or remove content in your work plan? Explain.
- (7) What opportunities exist to collaborate across GITs? Can we target conservation or restoration work to yield co-benefits that would address multiple factors or support multiple actions across outcomes?
- (8) What is needed from the Management Board to continue or accelerate your progress? Multiple asks of the Management Board should be prioritized where possible.

Appendix A | Item 1: Adaptive Management Decision Framework Diagram



Appendix A | Item 2: Modified Decision Framework Diagram to Explain the Role of Three Indicator Types in Adaptive Management



Appendix B: Guide to Influencing Factors

Factor	Description
Public Engagement	Public comprehension of an issue and commitment to take action (which is often the basis for public pressure on legislators and resource managers).
Landowner Engagement	Landowner comprehension of an issue and commitment to take action (which is often the basis for individual actions affecting land use and best management practice implementation).
Legislative Engagement at the Federal, State and/or Local Levels	Legislative comprehension of an issue and commitment to take action (which is often the basis for actions that are necessary to set policies and commit resources to achieve a desired outcome).
Government Agency Engagement at the Federal, State and/or Local Levels	Are agency priorities and resources aligned with the Chesapeake Bay Program's strategy to achieve a desired outcome? These are often the conditions that are necessary for Chesapeake Bay Program partners to implement work plans.
Nongovernmental Organization Engagement	Organization comprehension of an issue and commitment to take action (which is often the basis for targeted action by the group to achieve a desired outcome).
Partner Coordination	Effective collaboration and integration of federal, state, and nongovernmental organization activities to achieve a desired outcome.
Use Conflict	Competing demands or expectations for resource use (natural resources, public funds, etc.) that compromise desired outcome attainment.
Population Growth	Often marked by changing land use, increased pollution loads, and/or increased use of resources.
Scientific and Technical Understanding	Sufficient information and adequate technical tools to support informed decisions and effective action. Can be needed to support research, monitoring, modeling, or decision-guidance development.
Biota (Flora and Fauna) <i>e.g., Population dynamics, disease, invasive species, or range shifts</i>	Characteristics of plant and animal populations or communities that affect the achievement of a desired outcome.
Habitat Condition <i>e.g., Water quality or habitat fragmentation</i>	Changes in the quality, quantity, or distribution of the parameters that make an area suitable for a population or community.
Climate Change	Changes in temperature, precipitation, and sea level that can affect the implementation of a management actions or the achievement of a desired outcome.

Appendix C: Example Logic Table

The following table (available as an Excel spreadsheet) should be used to explain the logic behind your work toward an Outcome. The table also allows you to indicate the status of your management actions and denote which actions have played the biggest role in progress made thus far or will likely play a critical role in progress in the future.

Some Management Strategies and Work Plans will not immediately or easily fit into this analytical format. However, **all GITs should complete columns one, two, three, four, five and nine** to bring consistency to and heighten the utility of these guiding documents. The remaining columns are recommended for those who are able to complete them.

The tables featured here are examples and do not necessarily reflect GIT input.

Required Elements:

Factor	Gap	Management Approach	Work Plan Action	Responsible Party	Critical Actions <i>Indicate with an X.</i>
Landowner Engagement: Dam owner permission to remove dams		Target outreach to landowners in order to foster cooperation and community engagement in fish passage restoration	Pursue dam removal incentive programs	MD	X
Use Conflict: Limited financial resources	Fish Passage Workgroup will need more than \$20 million in project implementation funds in order to meet Outcome	Prioritize dam removal projects to ensure the strategic investment of public funds	Identify high-priority watersheds in MD, PA and VA in which to focus fish passage efforts	Fish Passage Workgroup	X
Habitat Condition: Populations of targeted fish species in decline		Establish the presence or absence of target species at a select number of fish passage projects	Conduct annual American shad count at Boshers' vertical slot fishway	VA	

Required + Optional Elements:

Factor	Gap	Management Approach	Work Plan Action	Responsible Party	How do you track whether action is complete?	Expected Response	Lesson(s) Learned	Adaptation(s) Made or Recommended	Critical Actions <i>Indicate with an X.</i>
Landowner Engagement: Dam owner permission to remove dams	Dam owner understanding of the ancillary benefits of dam removal	Target outreach to landowners in order to foster cooperation and community engagement in fish passage restoration	Pursue dam removal incentive programs	MD	Incentive programs established	Increased dam removals on private properties			X
Use Conflict: Limited financial resources	Fish Passage Workgroup will need more than \$20 million in project implementation funds	Prioritize dam removal projects to ensure the strategic investment of public funds	Identify high-priority watersheds in MD, PA and VA in which to focus fish passage efforts	Fish Passage Workgroup	High-priority watersheds identified				X
Habitat Condition: Populations of targeted fish species in decline		Establish the presence or absence of target species at a select number of fish passage projects	Conduct annual American shad count at Boshers' vertical slot fishway	VA	Data collected	American shad presence established			

Appendix D: Quarterly Review Meeting Schedule

Date	Theme and Outcomes
May 2017	Healthy Watersheds <ul style="list-style-type: none"> • Healthy Watersheds • Protected Lands • Stream Health • Brook Trout • Fish Habitat • Fish Passage
August 2017	Aquatic Life <ul style="list-style-type: none"> • Blue Crab Abundance • Blue Crab Management • Oysters • Forage Fish • Submerged Aquatic Vegetation
November 2017	Stewardship <ul style="list-style-type: none"> • Citizen Stewardship • Diversity • Public Access Site Development
February 2018	Next-generation Stewards <ul style="list-style-type: none"> • Environmental Literacy Planning • Student • Sustainable Schools
May 2018	Water Quality <ul style="list-style-type: none"> • Toxics Contaminants Research • Toxic Contaminants Policy and Prevention • 2017 and 2025 Watershed Implementation Plans • Water Quality Standards Attainment and Monitoring • Forest Buffers
August 2018	Climate Change and Resiliency <ul style="list-style-type: none"> • Wetlands • Black Duck • Climate Adaptation • Climate Monitoring and Assessment
November 2018	Local Action <ul style="list-style-type: none"> • Tree Canopy • Local Leadership • Land Use Methods and Metrics Development • Land Use Options Evaluation
January 2019	Biennial Strategy Review System Meeting

Additional Attachments:

- Annotated Progress Graphic (.PPT)
- Logic Table (.XLS)
- Discussion and Analysis Presentation Template (.PPT)
- Quarterly Progress Meeting Agenda (.PDF)
- Two-Day Biennial Review Meeting Notes (.PDF)