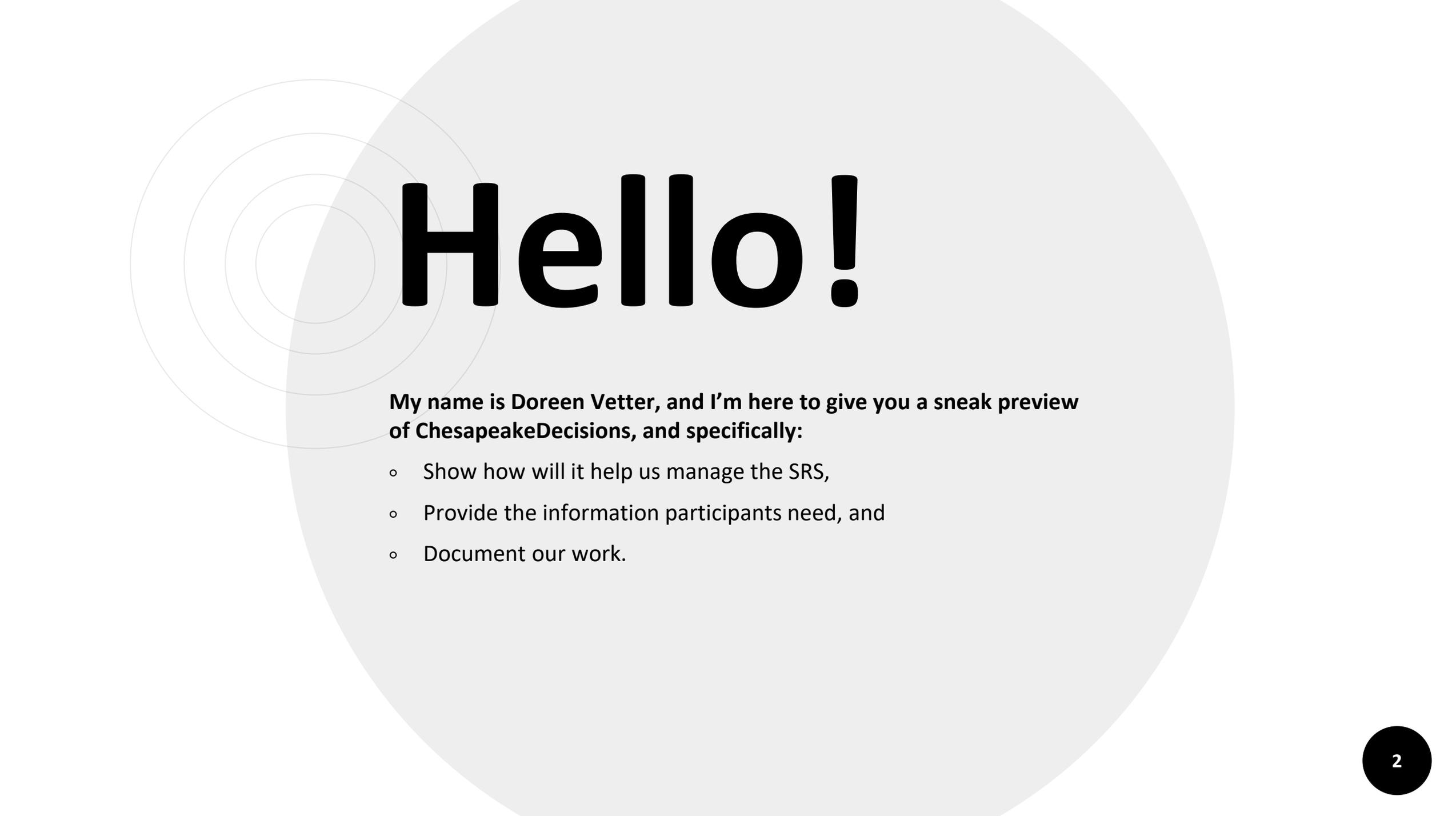**ChesapeakeDecisions: Supporting the SRS**

A Sneak Preview for GIT6
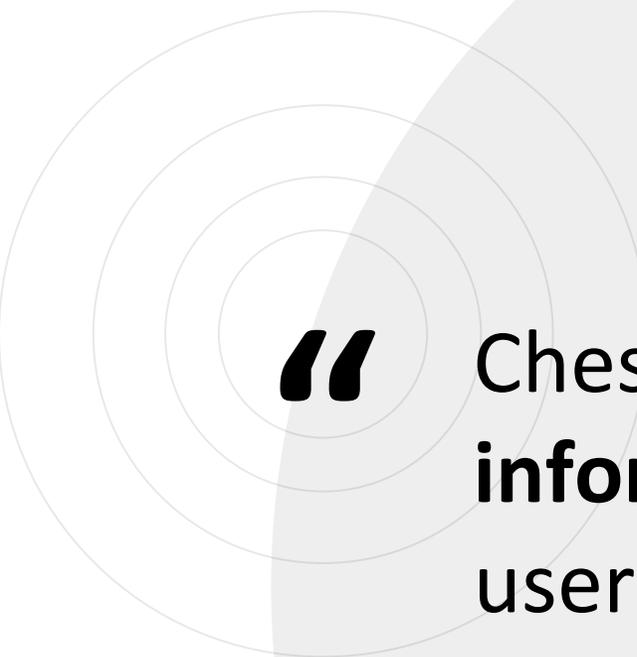December 11, 2018

Hello!

My name is Doreen Vetter, and I'm here to give you a sneak preview of ChesapeakeDecisions, and specifically:

- Show how will it help us manage the SRS,

- Provide the information participants need, and

- Document our work.

" ChesapeakeDecisions has been **informed by** extensive research, user testing, input and feedback collected from interviews, meetings, and the refinement and use of SRS documents.
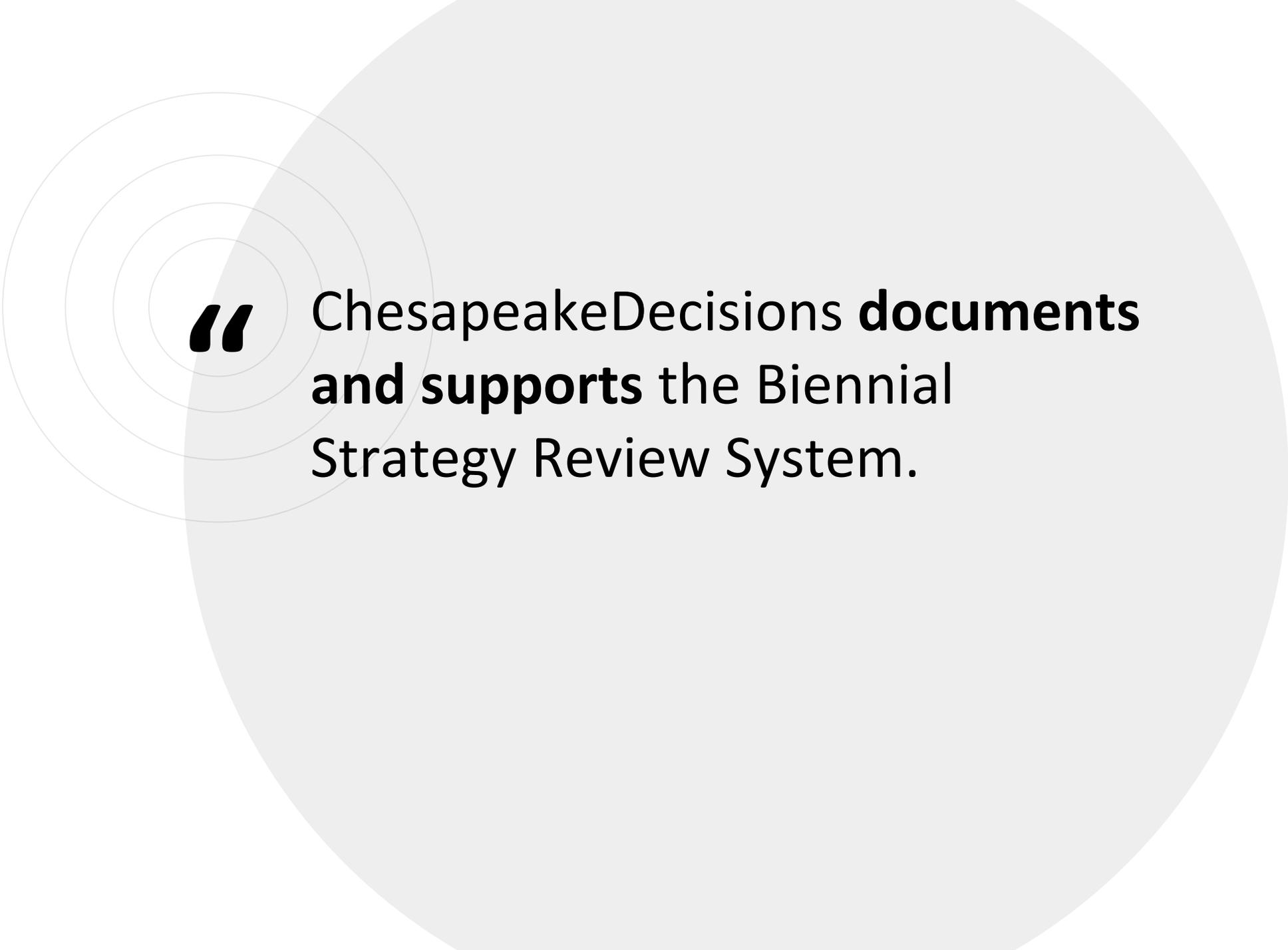
" ChesapeakeDecisions **documents and supports** the Biennial Strategy Review System.

Solving problems and pain points has defined our approach.

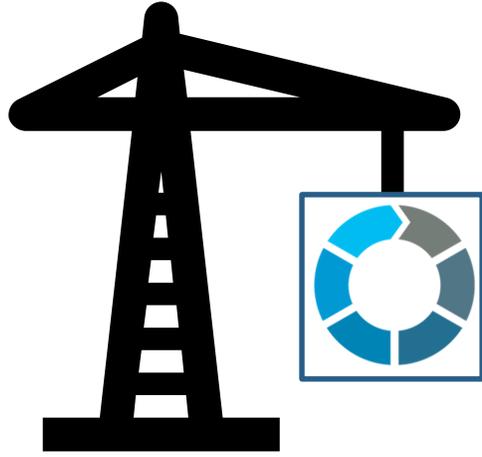|	
Clarify and simplify instructions and materials	✓
Improve access to documents	✓
Track dates and deadlines	✓
Track requests and decisions	✓

ChesapeakeDecisions
has been designed and
is being developed.
Initial content is
drafted.

Chesapeake Bay Program
Science. Restoration. Partnership.

WHAT WE DO > WHAT GUIDES US

What Guides Us

Over our long history, a series of written agreements and science-based goals have guided our work, helping our partners track changes in the health of the Chesapeake Bay.

Chesapeake Bay Watershed Agreement

Management Strategies and Work Plans

ChesapeakeDecisions

ChesapeakeDecisions documents and

ChesapeakeDecisions

ChesapeakeDecisions documents and supports the Biennial Strategy Review System (SRS): a two-year, recurring process that applies adaptive management to the Chesapeake Bay Program's work.

The Chesapeake Bay Program follows a structured, iterative decision-making process known as adaptive management.

Upcoming Quarterly Progress Meetings

November 15, 2018
1:00pm - 4:00pm

Local Action Quarterly Progress
Meeting

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Narrative (.docx)

" It will **help the SRS Planning Team guide** the partnership through the SRS process.

CHESAPEAKE DECISIONS

The Chesapeake Bay Program follows a structured, iterative decision-making process known as adaptive management.

Upcoming Quarterly Progress Meetings

November 15, 2018
1:00pm - 4:00pm

Local Action Quarterly Progress Meeting

Export this Event >>

<< View Past Meetings   Meetings Calendar >>

What is adaptive management?

Adaptive management is a decision-making process that allows the Chesapeake Bay Program to make decisions in the face of uncertainty, reduce this uncertainty over time and learn while doing. Through this process, workgroups, Goal Implementation Teams (GITs)

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Presentation (.ppt)

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What is adaptive management?

Adaptive management is a decision-making process that allows the Chesapeake Bay Program to make decisions in the face of uncertainty, reduce this uncertainty over time and learn while doing. Through this process, workgroups, Goal Implementation Teams (GITs) and the partnership as a whole are encouraged to take action, monitor results, assess progress and adjust efforts as needed.
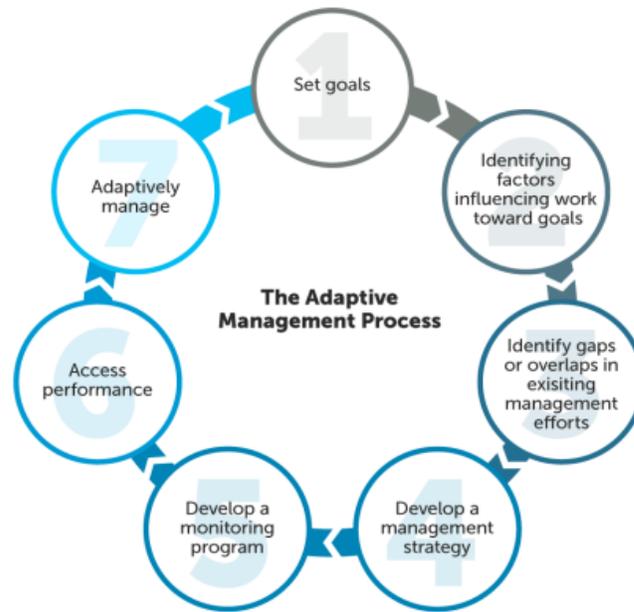
Adaptive management was adopted by the Principals' Staff Committee in 2011 and named a core principle of the Chesapeake Bay Watershed Agreement in 2014.

How does the Chesapeake Bay Program adaptively manage its work?

The Chesapeake Bay Program adopted the Biennial Strategy Review System (SRS) in 2016 to

Logic Table (.docx)

Narrative (.docx)

Presentation (.ppt)

Timeline and Cohorts

The Biennial Strategy Review System (SRS) is a two-year, recurring process that applies adaptive management to the Chesapeake Bay Program's work.

SRS Timeline

February	May	August	November
Next-generation Stewards	Clean Water	Climate Change and Resiliency	Local Action

2017   **2018**   2019

Each two-year cycle of the Biennial Strategy Review System (SRS) includes seven quarterly progress meetings that allow pre-defined "cohorts" of workgroups and Goal Implementation Teams (GITs) to revise their management strategies and work plans, report their progress, explain their challenges and make requests for action, support or assistance to the Management Board. The Two-Day Biennial Review Meeting marks the end of one cycle of the SRS and the start of the next, allowing the partnership to celebrate successes,

SRS Cohorts

A cohort is a pre-defined set of the workgroups and Goal Implementation Teams (GITs) that represent a particular group of Chesapeake Bay Watershed Agreement outcomes. Seven cohorts participate in the Biennial Strategy Review System (SRS), and each cohort participants in its own quarterly progress meeting with the Management Board.

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SRS Cohorts

A cohort is a pre-defined set of the workgroups and Goal Implementation Teams (GITs) that represent a particular group of Chesapeake Bay Watershed Agreement outcomes. Seven cohorts participate in the Biennial Strategy Review System (SRS), and each cohort participants in its own quarterly progress meeting with the Management Board.

The cohorts and their outcomes include:

- **Healthy Watersheds:** Brook Trout, Fish Habitat, Fish Passage, Healthy Watersheds, Protected Lands and Stream Health
- **Aquatic Life:** Blue Crab Abundance, Blue Crab Management, Forage Fish, Oysters and Submerged Aquatic Vegetation (SAV)
- **Stewardship:** Citizen Stewardship, Diversity and Public Access Site Development
- **Next-generation Stewards:** Environmental Literacy Planning, Student and Sustainable Schools
- **Clean Water:** Forest Buffers, Toxic Contaminants Policy and Prevention, Toxic Contaminants Research, Water Quality Standards Attainment and Monitoring and 2017 and 2025 Watershed Implementation Plans (WIPs)
- **Climate Change and Resiliency:** Black Duck, Climate Adaptation, Climate Monitoring and Assessment, and Wetlands
- **Local Action:** Land Use Methods and Metrics Development, Land Use Options Evaluation, Local Leadership and Tree Canopy

These cohorts were designed to bring related work together and to cue discussion at the most appropriate times. Their placement in the SRS schedule was determined with the timing of data updates and key meeting in mind.
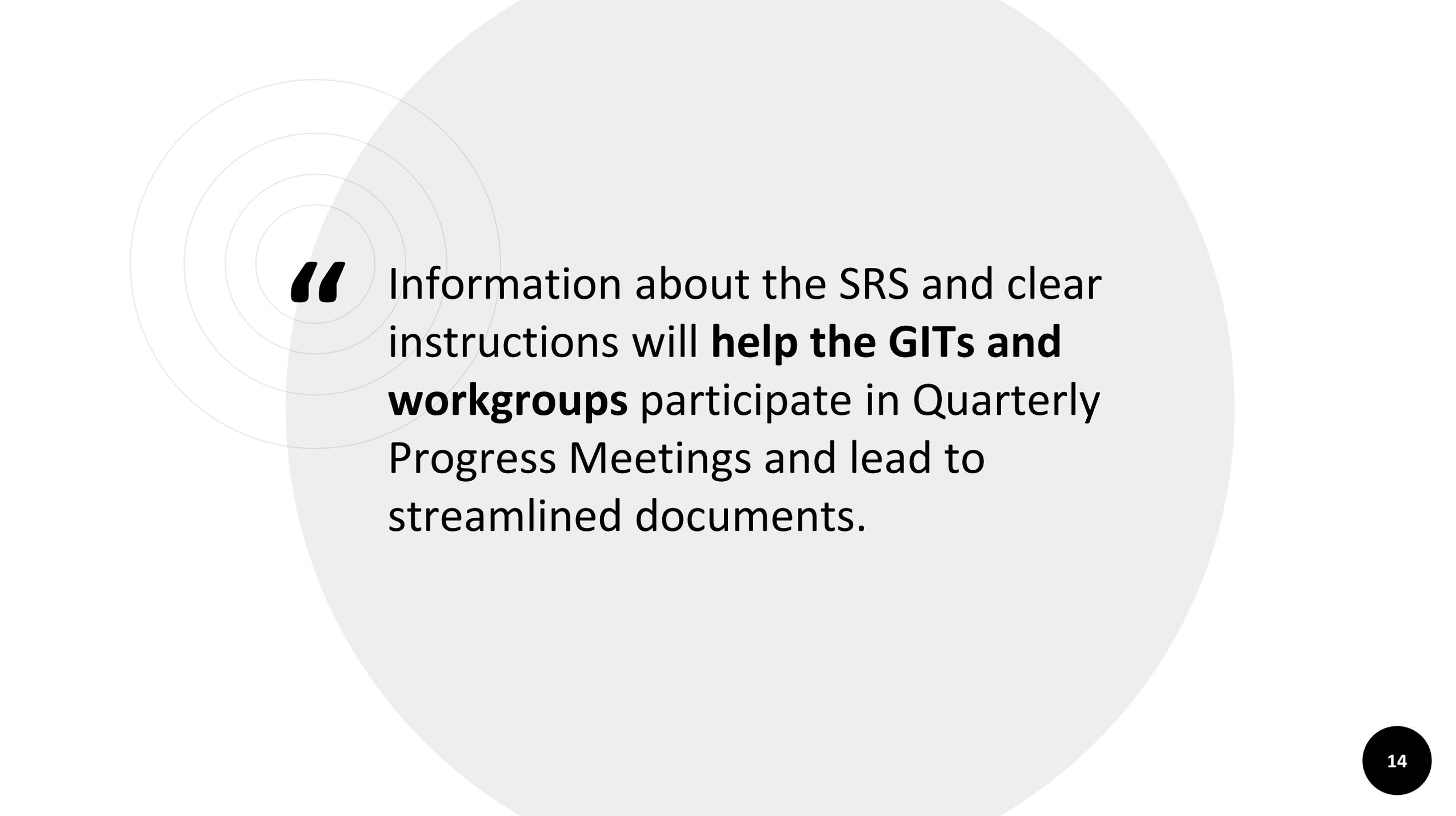
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" Information about the SRS and clear instructions will **help the GITs and workgroups** participate in Quarterly Progress Meetings and lead to streamlined documents.

Guide to the SRS

The Biennial Strategy Review System (SRS) is a two-year, recurring process that applies adaptive management to the Chesapeake Bay Program's work.

Each two-year cycle of the Biennial Strategy Review System (SRS) includes seven quarterly progress meetings that allow pre-defined "cohorts" of workgroups and Goal Implementation Teams (GITs) to revisit their management strategies and work plans, report their progress, explain their challenges and make requests for action, support or assistance to the Management Board. The steps that workgroups and GITs must follow to prepare for, participate in and act after their quarterly progress meetings are described below.

Before Your Meeting

Five Weeks

Five weeks before a cohort's quarterly progress meeting, the cohort is invited to meet with the SRS Planning Team to discuss the process they will go through and the work that is expected of them. The Planning Team will assign a mentor to each of the Chesapeake Bay Watershed Agreement outcome representatives within a cohort. Mentors will be available on an as-needed basis to walk workgroups and GITs through key documents and review these documents before they are submitted to the Management Board.

Two Weeks

Two weeks before a cohort's quarterly progress meeting, the cohort is invited to meet with the Scientific, Technical Assessment and Reporting Team (STAR) to practice and receive feedback on their draft presentations. On the Monday after this meeting, the cohort must submit three documents to the SRS Planning Team, who will post them to the Chesapeake

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These short-term actions should be traced back to the factors, efforts and gaps identified in your logic table. Learn more in our guide to completing the logic table.

During Your Meeting

During each quarterly progress meeting, the Chesapeake Bay Watershed Agreement outcome representatives within a particular cohort present to the Management Board. After each presentation, the Management Board discusses recommendations or requests for action, support or assistance and determines how to proceed.

Issues and asks raised during a quarterly progress meeting may be discussed, refined or resolved at the next month's meeting of the Management Board or at future Management Board meetings.

After Your Meeting

Three Days

Three days after a cohort's quarterly progress meeting, the cohort is invited to hold a "debrief" with the SRS Planning Team.

Two Weeks

Two weeks after a cohort's quarterly progress meeting, the cohort works with the SRS Planning Team to refine its requests for action, support or assistance. Refined requests—as well as any supporting documents or agreed-upon actions and decisions from the quarterly progress meeting—are sent to the Management Board and published on our Requests and Decisions page.

Four Weeks

Four weeks after a cohort's quarterly progress meeting, the cohort attends another meeting of the Management Board to discuss, refine or resolve issues and asks raised during their quarterly progress meeting.

FAQ

Do you have a question about the Biennial Strategy Review System (SRS)? Explore these frequently asked questions to learn more about adaptive management at the Chesapeake Bay Program.

General

⊙ **What is the Biennial Strategy Review System (SRS)?**

The Biennial Strategy Review System (SRS) is a two-year process that applies adaptive management to the Chesapeake Bay Program's work. A single cycle of the Biennial SRS includes one Two-Day Biennial Review Meeting and seven Quarterly Progress Meetings. As a whole, this process allows the partnership to review its progress; consider the scientific, fiscal and policy developments that could affect its future; identify the management approaches and actions that are or are not working; and adjust these approaches and actions as needed.

⊙ **Who manages the Biennial Strategy Review System (SRS)?**

⊙ **What is a Quarterly Progress Meeting?**

⊙ **What is a cohort?**

⊙ **Which cohort do I belong to?**

Preparing for a Quarterly Progress

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Logic Table (.docx)

Vision: Streamlined Documents

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- Uses content from multiple guides
- Leads user through the information
- Combines multiple schedules in a single place

Logic Table

The logic table illustrates the link between the factors that could impact the Chesapeake Bay Program's ability to achieve an outcome and the actions it is taking to manage them.

The logic table is made up of seven parts: factors, efforts, gaps, actions, metrics, response and lessons learned. To complete a logic table, workgroups and Goal Implementation Teams (GITs) should follow the steps below to update their previously completed logic tables or to fill out the logic table template.

1. List the significant factors—whether positive or negative—that could impact the Chesapeake Bay Program's ability to achieve an outcome.

Common factors include public engagement, landowner engagement and nongovernmental organization engagement; legislative and government agency engagement at the federal, state or local levels; partner coordination; use conflict; population growth; scientific and technical understanding; flora and fauna; habitat condition; climate change; and funding or financial resources.

2. List the existing efforts that are supporting the Chesapeake Bay Program's work to manage each of the aforementioned factors.

These efforts could come from within or outside of the Chesapeake Bay Program, and could be deliberately or unintentionally supporting the partnership's work. If, for example, public engagement is a factor that could impact the Chesapeake Bay Program's work toward a particular outcome, this outcome's lead GIT may decide

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Narrative

The narrative indicates whether the Chesapeake Bay Program is doing what it said it would do and whether its actions are having their intended effect. It also describes whether the partnership should make adaptations or change course.

The narrative is made up of seven parts: assumptions, progress, actions, lessons learned, adaptations, cross-outcome collaboration and requests for action or assistance. To complete a narrative, Goal Implementation Teams (GITs) should answer the questions below within the narrative template.

1. Are the assumptions included in your most recent management strategy still accurate and applicable?

Describe the significant factors you identified, the programmatic gaps that, if filled, would manage these factors and the management approaches you selected to fill these gaps. Has the logic table you completed in support of this Quarterly Progress Meeting revealed any of these factors, gaps or management approaches to be incorrect or irrelevant?

2. Are you making progress toward your outcome at your anticipated rate?

Describe your target, deadline, anticipated trajectory and actual progress made thus far. Explain any gap(s) between your actual progress and anticipated trajectory.

3. Which of your management actions have been the most critical to

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Presentation

The presentation summarizes the narrative for the Management Board and supports a Goal Implementation Team's requests for action, support or assistance.

Like the narrative, the presentation indicates whether the Chesapeake Bay Program's assumptions about an outcome have changed and whether the partnership is doing what it said it would do to achieve it. It also describes whether the partnership's actions are having the intended effect and whether it should make adaptations or change its course.

Unlike the narrative, the presentation is limited to the most important parts of a progress review: the information that supports a Goal Implementation Team's (GIT's) recommendations or requests for action, support or assistance from the Management Board. Each recommendation or request can be traced to an action that is meant to manage a factor that, if not addressed, could hinder the Chesapeake Bay Program's progress toward an outcome.

To complete a presentation, GITs should add their own information to the presentation template.

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" Easy access to materials and meeting and due dates will **help all participants** in the SRS.

CHESAPEAKE DECISIONS

The Chesapeake Bay Program follows a structured, iterative decision-making process known as adaptive management.

Upcoming Quarterly Progress Meetings

November 15, 2018
1:00pm - 4:00pm

Local Action Quarterly Progress Meeting

Export this Event »

<< View Past Meetings   Meetings Calendar >>

What is adaptive management?

Adaptive management is a decision-making process that allows the Chesapeake Bay Program to make decisions in the face of uncertainty, reduce this uncertainty over time and learn while doing. Through this process, workgroups, Goal Implementation Teams (GITs)

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Meetings and Deadlines

Each cycle of the Biennial Strategy Review System (SRS) includes seven quarterly progress meetings and meetings between Goal Implementation Teams, workgroups, the Scientific, Technical Assessment and Reporting Team (STAR) and the SRS Planning Team. Dates, deadlines and links to supporting documents can be found below.

Filter By:

Cohort

- ☑ Healthy Watersheds
- ☑ Aquatic Life
- ☑ Stewardship
- ☑ Next-generation Stewards
- ☑ Clean Water
- ☑ Climate Change and Resiliency
- ☑ Local Action

View Past Meetings and Deadlines >>

Upcoming Meetings and Deadlines

September 2018

Clean Water

Meetings	Deadlines
No scheduled meetings	

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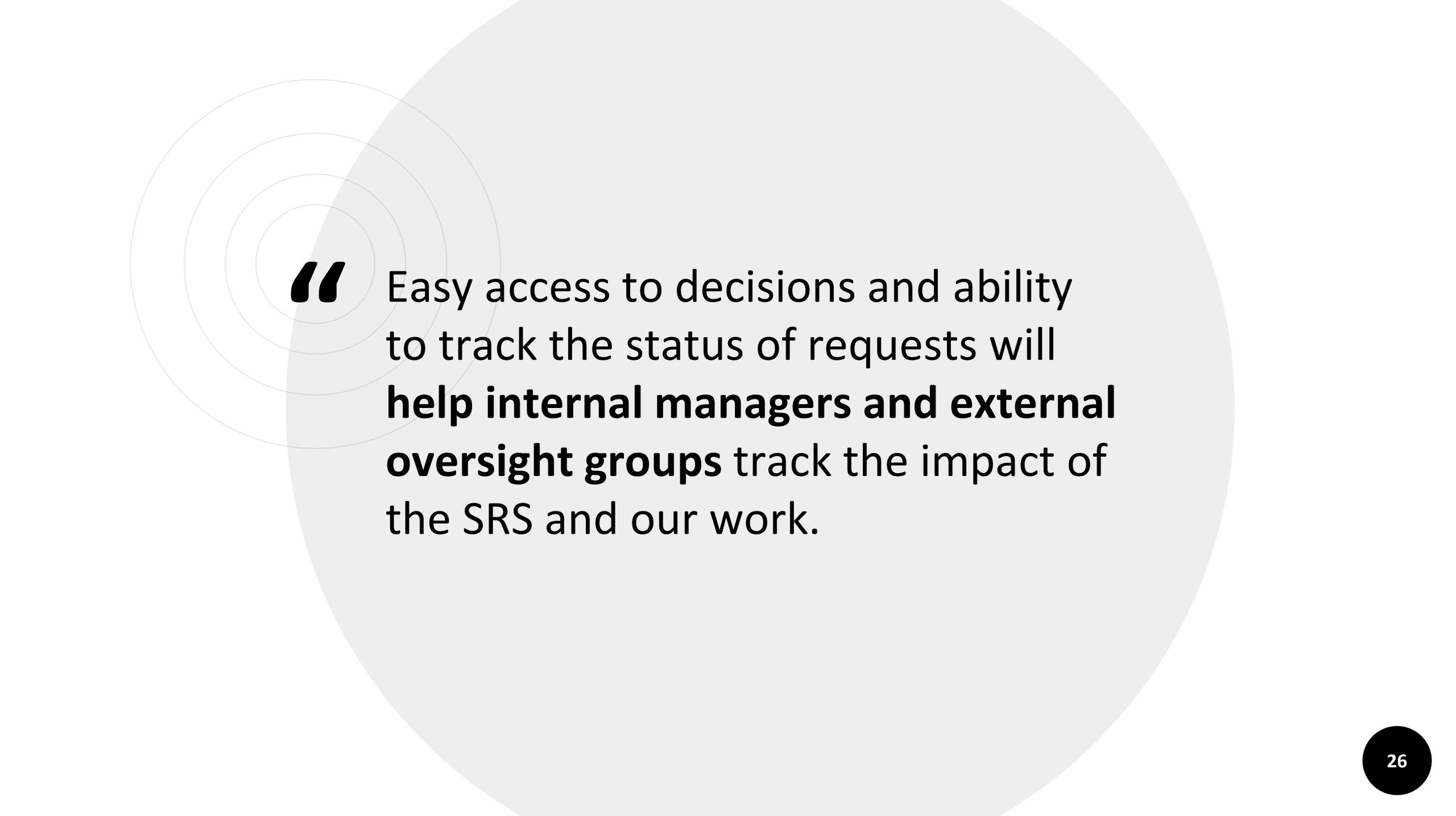
" Easy access to decisions and ability to track the status of requests will **help internal managers and external oversight groups** track the impact of the SRS and our work.

Requests and Decisions

At each quarterly progress meeting, Goal Implementation Teams ask the Management Board to take an action or provide assistance in making progress toward their Chesapeake Bay Watershed Agreement outcomes. Individual requests and partnership responses can be found below.

✓ By Cohort
By Requesting GIT
By Responsible Party

Search:

By Cohort ▼

All Cohorts ▼   Search

Filter: All | Resolved | In Progress

Climate Change and Resiliency
August 9, 2018

Black Duck   In Progress

Request: The Black Duck Action Team asked the Management Board to agree to its decision to develop a new indicator of progress toward...[Read More]

Requesting GIT: Vital Habitats

Responsible Party: Black Duck Action

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Logic Table (.docx)

By Responsible Party ▼

Please select a party ▼   Search

Healthy Watersheds
May 11, 2017

Fish Habitat Resolved

Request: The Fish Habitat Action Team asked the Management Board to encourage Delaware, Maryland, New York, Pennsylvania...[Read More]

Decision: The Management Board agreed to form an action team to fulfill this request, and published a series of fact sheets that illustrate...[Read More]

Requesting GIT: Sustainable Fisheries
Responsible Party: Management Board
Due Date: N/A

Brook Trout In Progress

Request: The Brook Trout Action Team asked the Management Board to expand the Chesapeake Bay Program's brook trout monitoring efforts...[Read More]

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" It will **help the Chesapeake Bay Program** partnership **promote transparency and accountability** by documenting the logic behind our work and providing easy access to our decisions.

Factor	Current Efforts	Gap	Actions (critical in bold)	Metrics	Expected Response and Application	Learn/Adapt
What is impacting our ability to achieve our outcome?	What current efforts are addressing this factor?	What further efforts or information are needed to fully address this factor?	What actions are essential (to help fill this gap) to achieve our outcome?	What will we measure or observe to determine progress in filling identified gap?	How do we expect these actions to address the identified gap? How might that affect our work going forward?	What did we learn from taking this action? How will this lesson impact our work?

Requesting GIT: Sustainable Fisheries
Responsible Party: Management Board
Due Date: N/A

Brook Trout   In Progress

Request: The Brook Trout Action Team asked the Management Board to expand the Chesapeake Bay Program's brook trout monitoring efforts...[Read More]
Requesting GIT: Vital Habitats
Responsible Party: Scientific, Technical Assessment and Reporting Team (STAR)
Due Date: September 13, 2018

Brook Trout   In Progress

Request: The Brook Trout Action Team asked the Management Board to communicate the importance of brook trout conservation to local...[Read More]
Requesting GIT: Vital Habitats
Responsible Party: Communications Workgroup
Due Date: September 13, 2018

Brook Trout   Resolved

Request: The Brook Trout Action Team asked the Management Board to press for more action team participation.
Decision: The Management Board directed the Enhancing Partnering, Leadership and Management GIT to

" It will **help the SRS Planning Team track** dates and deadlines and **manage implementation** of the SRS process.

Cohort Status

The seven cohorts within the Biennial Strategy Review System (SRS) are at different stages of their work to prepare for, participate in and follow up on their quarterly progress meetings with the Management Board.

[f] [twitter] [email]

Filter By:

Cohort

☑ Healthy Watersheds   ☑ Clean Water

☑ Aquatic Life   ☑ Climate Change and Resiliency

☑ Stewardship   ☑ Local Action

☑ Next-generation Stewards

Healthy Watersheds

Brook Trout

Mentor: [First Name] [Last Name]

Progress Meeting Materials

Logic Table Status: Accepted	Narrative Status: Submitted	Presentation Status: Past Due

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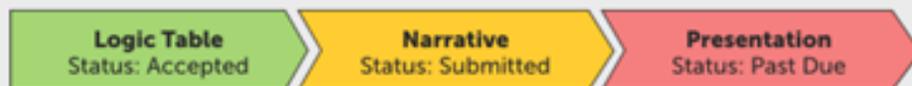## Download Templates

Logic Table (.docx)

"
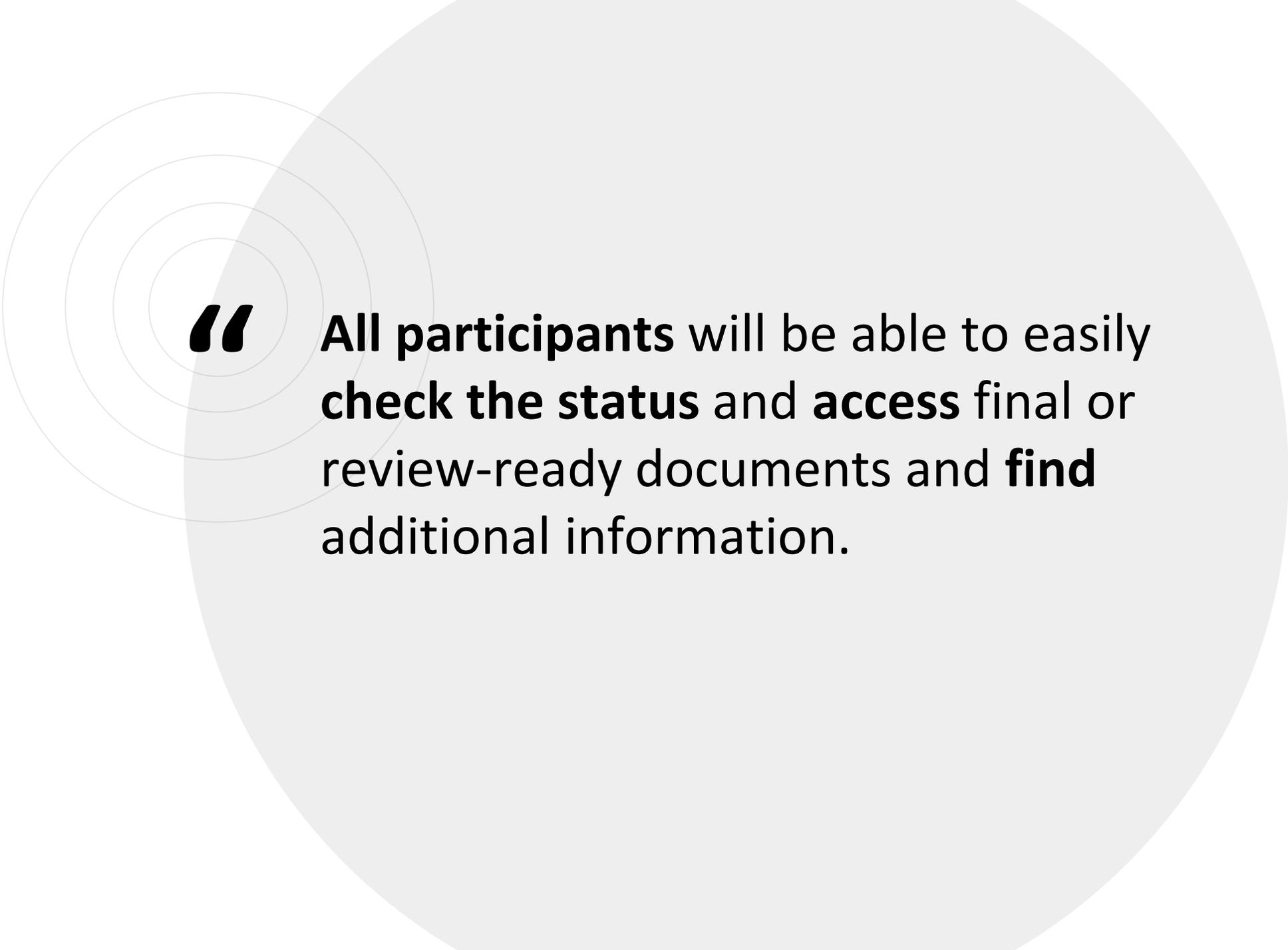
All participants will be able to easily **check the status** and **access** final or review-ready documents and **find** additional information.

Healthy Watersheds

Brook Trout
Mentor: [First Name] [Last Name]

Progress Meeting Materials

Logic Table	Narrative	Presentation
Status: Accepted	Status: Submitted	Status: Past Due

Logic Table Dates
Due: 3/21/18
Submitted: 4/15/18
Accepted: 4/29/18
View Documents >>

Narrative Dates
Due: 3/21/18
Submitted: 4/15/18
Accepted:
View Documents >>

Presentation Dates
Due: 3/21/18
Submitted:
Accepted:
View Documents >>

Management Materials

Management Strategy (V2)	Work Plan
Status: Accepted	Status: Submitted

Management Strategy Dates
Due: 3/21/18
Submitted: 3/21/18
Open for feedback: 3/30/18 - 4/14/18
Submitted: 4/15/18
Accepted: 4/29/18
View Documents >>

Work Plan Dates
Due: 3/21/18
Submitted: 3/21/18
Open for feedback: 3/30/18 - 4/14/18
Submitted:
Accepted:
View Documents >>

Fish Habitat

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Timeline

December
- Content development.
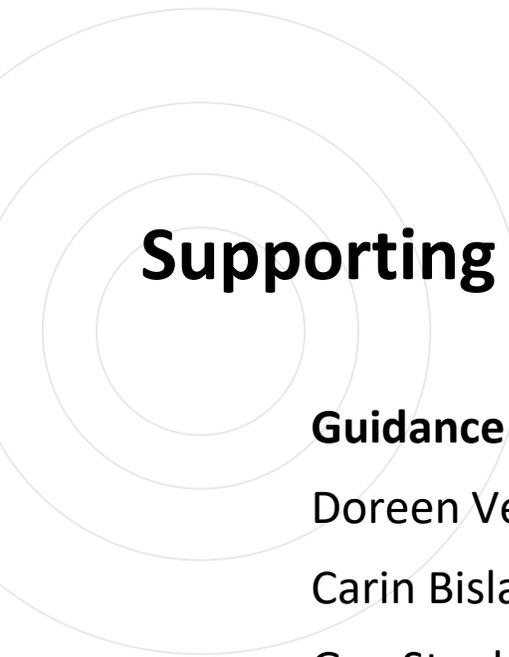- Site development.

January
- Finalize content development to reflect adjustments and dates/deadlines for new SRS cycle.
- Site development.

February
- Finalize development for ChesapeakeDecisions.
- User testing.

March
- Biennial Review Meeting
- **Release of ChesapeakeDecisions.**

Supporting staff have included:

Guidance

Doreen Vetter

Carin Bisland

Guy Stephens

User Experience

Aera Hoffman

Content

Catherine Krikstan

Doreen & Laura

Joan Smedinghoff

Design

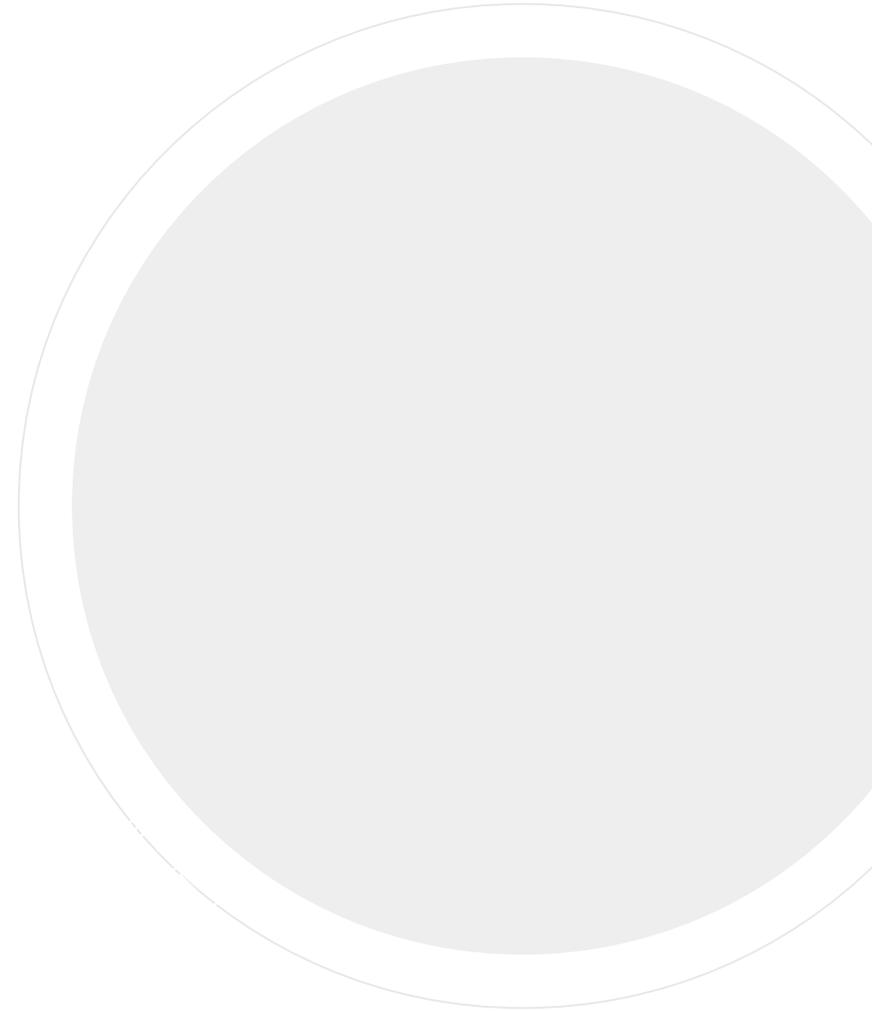Dave Yayac

Development

Bill Whorton

Critical Input
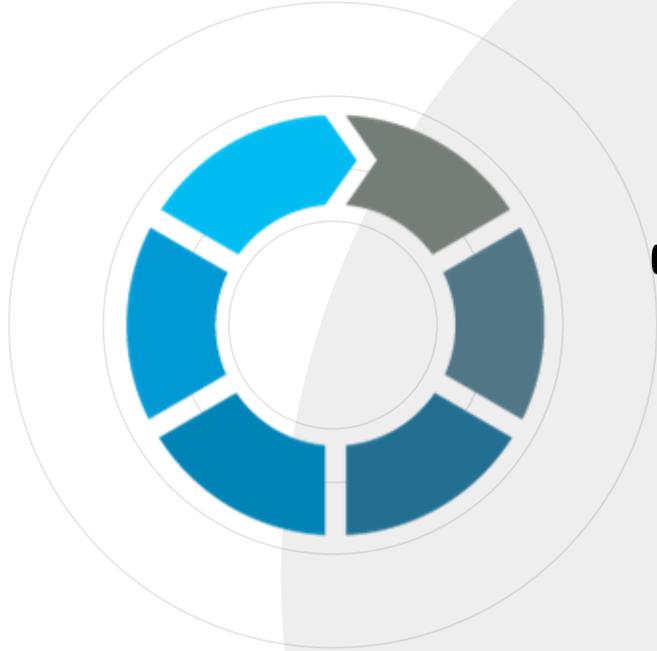
Laura Drescher

Dave Goshorn

Laurel Abowd

Emily Freeman

Thanks!

What questions do you have?

Email me at:

Vetter.Doreen@epa.gov