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:
By the end of 2017, with the direct involvement of local governments or their representatives, evaluate policy options, incentives and planning tools that could assist them in continually improving their capacity to reduce the rate of conversion of agricultural lands, forests and wetlands as well as the rate of changing landscapes from more natural lands that soak up pollutants to those that are paved over, hardscaped or otherwise impervious. Strategies should be developed for supporting local governments' and others' efforts in reducing these rates by 2025 and beyond.

Lead and Supporting Goal Implementation Teams (GITs):
Healthy Watersheds GIT, support of Water Quality GIT

Participating Partners:
- Signatory and Initial Participating Partners (Bold indicates initial partners critical to early work)
    - State of Delaware
    - State of Maryland (**MD Department of Planning**)
    - District of Columbia
    - Commonwealth of Pennsylvania
    - Commonwealth of Virginia
    - U.S. Environmental Protection Agency
    - Chesapeake Bay Commission
    - Local Government Advisory Committee
    - U.S. Fish Wildlife Service
    - U.S. Geological Survey
    - National Park Service
    - USDA Natural Resources Conservation Service
    - **The Nature Conservancy**
- Current Participating Partners
    - Renee Thompson, HWGIT Coordinator

Progress:
- Prior to GIT funding in 2014, there was a call to the GITs for projects, as part of an existing Tetra Tech contract to EPA. The HWGIT took advantage of this funding and worked with Tetra Tech to develop a plan for implementation of the three tasks identified as important by the HWGIT and outlined in the Land Use Options Evaluation Management Strategy. Tetra Tech developed a final report, *Approach to Chesapeake Bay Land Use Policy Tasks*, that included recommendations and approaches to complete three tasks that would achieve the outcome. The three tasks are: (1) Conduct a survey of CBP stakeholders; (2) Identify existing land-use policy options, incentives, and planning tools; and (3) Create an online repository of examples that could assist local governments

- There have been two GIT funding projects that have helped achieve the first target in the outcome: *by the end of 2017, evaluate policy options, incentives and planning tools that could assist local governments in reducing the rate of natural land conversion*.
  - In 2015, the HWGIT developed a GIT Funding project, the *Conservation Land-Use Policy Toolkit*, to address task two identified from the Tetra Tech report. The University of Maryland National Center for Smart Growth was the contractor on this project, where they conducted a study to determine the spectrum of existing policy options, incentives and planning tools currently being implemented at the local and state level. The final report/toolkit was completed in 2017; it directly addresses the first target and can be used to provide local governments the information and tools to reduce the conversion of farmland, forestland, and wetland.
  - Since 2014, the HWGIT has been working with Virginia and Pennsylvania on the *Healthy Watersheds Forest Retention Project*. There are three phases of this project. Phase I, made an economic case for "crediting conservation" by quantifying the value of retaining forestland. Phase II, worked with localities in Virginia and Pennsylvania to identify policy tools and incentives. Phase III has two components, (1) implement a training program for locals on how to use Phase II finding and (2) develop a large-scale private sector financing model that encourages land use planning decisions that reduce projected future TMDL requirements (crediting conservation). This project also directly addresses the first target and provides local governments information about land use policy tools.
- The *Healthy Watersheds Forest Retention Project: Phase III* (currently underway) also starts to address second target in the outcome: *by 2025 and beyond, develop strategies for supporting local governments in reducing land conversion rates*. Crediting conservation within the Chesapeake Bay Land Change Model could play a big role in incentivizing locals to consider land conservation as key strategy in reducing the rate of natural land conversion.

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

The first part of the outcome is to evaluate policy options, incentives and planning tools that could local governments. Technical Understanding is a factor influencing this success. Management Approach 1 addresses this by determining the spectrum of existing land use "policy options, incentives, and planning tools" currently being implemented at the local state level. The action items under this approach increase our knowledge of "policy options, incentives, and planning tools" local governments could use which can then also be used to create materials needed to improve their capacity to reduce land conversion.

Education and Outreach for local and state governments is another factor influencing the success. Management Approach 2 actions are to gather, summarize, and place on the Chesapeake Bay Program website existing studies and reports on land use "policy options, incentives, and planning tools". Management Approach 2, with the assistance of Management Approach 1 actions, will actually provide local governments with education and outreach materials. Action items under Management Approach 2 will also address local government engagement and legislative engagement, two additional factors influencing the success of reducing land conversion.

The outcome requires "the direct involvement of local governments or their representatives." Engagement is a factor influencing this success and is addressed in Management Approach 3 to survey local governments and interest groups to determine most effective options.

The second part of the outcome is to develop strategies to reduce land conversion rates. Funding and Finance and continued engagement are factors influencing this success. Management Approach 4 addresses this

by using the results of the first three Management Approach tasks to indicate whether additional work is needed to fulfill the evaluation component of this outcome and proceed with the strategy development component. This Management Approach will address any additional factors influencing success and will ensure completion of the outcome and its targets.

Step 3: Craft a compelling narrative.

What are our assumptions?

(1) What original assumptions did we make in our Management Strategy that we felt were important to our success?
   a. What "Factors Influencing Success" were originally identified in your Management Strategy?
      i. Political and Education Challenges
      ii. Sustaining the Ag and Forestry Industries
      iii. Ability to Engage Local Governments in Conducting the Evaluation
      iv. Technical Challenges

   b. What programmatic gaps that fail to address those factors did you originally identify in your Management Strategy?
      i. At all levels of government and among many nongovernmental organizations, efforts to promote and implement smart growth measures are underway, but the level and type of effort varies across the watershed. At this time there is no coordinated watershed effort to promote and implement smart growth measures as a means to protect the Bay and the rural lands in the watershed
      ii. Actions, tools or technical support needed to empower local government and others will be determined through the tasks listed under the management approach.

   c. What were the "Management Approaches" you chose to include in your Management Strategy and Two-Year Work Plan in order to address those gaps?
      i. Determine the spectrum of existing land use "policy options, incentives and planning tools" currently being implemented at the local and state level.
      ii. Gather, summarize, and place on the Chesapeake Bay Program website (or other locals as determined in the Local Leadership Management Strategy approach for improving transfer of knowledge to locals) existing studies and reports on the costs, benefits, and effectiveness of both local and state level land use "policy options, incentives, and planning tools".
      iii. Survey local governments and interest groups to determine which of the "policy options, incentives and planning tools" implemented at the local or state level have been most effective at reducing land conversion rates; whether the compilation of existing studies and reports on "policy options, incentives and planning tools" placed on the Bay Program website is sufficient to meet their needs; and if not, what more do they need to achieve a reduction in land conversion rates.

iv. Use the results of the first three Management Approach tasks to indicate whether additional work is needed to fulfill the evaluation component of this outcome and proceed with the strategy development component of this outcome.

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.)?

By 2017, evaluate policy options, incentives and planning tools that could assist local governments in improving their capacity to reduce the rate of natural land conversion to impervious land covers.

By 2025, develop strategies for supporting local governments and others to reduce these rates.

b. What is your anticipated deadline? What is your anticipated trajectory?

There is an evaluation deadline of 2017 and a strategy development deadline of 2025.

c. What actual progress has been made thus far?

There was a study done to develop approaches for reaching the outcome and two studies that have evaluated policy options, incentives and planning tools local governments can use, which is addresses the first part of the outcome. (See the Progress section for more details on these projects/studies)

d. What could explain any existing gap(s) between your actual progress and anticipated trajectory?

i. CBP and HWGIT staff capacity

ii. Knowledge of how to compile and package materials effectively for local governments

iii. CBP and HWGIT staff is not sure if the survey is necessary or if we can draw on existing resources and outreach to other CBP groups to glean the information we are seeking

iv. Knowledge of how to reach our audience (local governments, planners, and officials)

(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.

i. Management Approach 1, determine the spectrum of existing "policy options, incentives and planning tools"

a. University of Maryland National Center of Smart Growth's study and *Healthy Watersheds Forest Retention Project Phase II* achieved this management approach of determining existing "policy options, incentives and planning tools". From here, we can ask local governments which "policy options, incentives and planning tools" are most effective for them, package materials related to those "policy options, incentives and planning tools", and make them accessible to local government which will "assist them in continually improving their capacity to reduce the rate of conversion" and help develop a strategy "for supporting local governments' and others' efforts in reducing these rates by 2025 and beyond"

b. This helps address technical understanding.

(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.

    ii.   <u>Management Approach 3</u>, surveying local governments to determine most effective "policy options, incentives and planning tools"

        a. This management approach addresses a part of the outcome to involve local govts and assist/support them. Involving local govts and determining what is best for them will be vital to meeting the second part of the outcome to a develop strategy that will actually reduce land conversion rates beyond 2025.

        b. To achieve this management approach, additional CBP/HWGIT capacity and better is CBP/GIT leadership/involvement needed.

        c. This approach addresses partner coordination, technical understanding, and education/outreach to local and state governments

        d. HWGIT staff recognizes that a survey may result in a duplication of efforts. The information needed for this approach may be available through existing resources (e.g., Ecologix report and newly reformed Local Leadership workgroup). This will be further investigated in the next workplan.

    iii.   <u>Management Approach 2</u>, gathering materials and putting them on a platform local leaders can access will

        a. Making sure the most effective "policy options, incentives and planning tools" gets into the hands of local governments is necessary to "assist them in continually improving their capacity to reduce the rate of conversion"

        b. To achieve this management approach, additional CBP/HWGIT capacity and better is CBP/GIT leadership/involvement needed. Another barrier to this management approach is HWGIT staff are not trained or educated on how to package materials and make them accessible to our audience. Assistance from Local Leadership, LGAC, the Communications Team, or the Decision Support Tools team at CBP might address this barrier. Additionally, Management Approach 3 might need to be completed first.

        c. This approach addresses partner coordination, education/outreach to local and state governments, local government engagement, and funding and finance for ag, forest, and wetland industries/conservation.

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?

This outcome does not have a workgroup or team behind it, so capacity is limited. This prevents Partner Coordination with in house CBP groups that could help with Education and Outreach to Local and State Government. The information for local governments is there, but HWGIT staff don't know the next steps and don't have the knowledge and capacity to compile and provide the outreach materials to locals. The use of partner coordination, working with CBP groups, and building off of existing efforts will be essential to address challenges and complete next steps.

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.

Partner Coordination and collaborating with existing CBP efforts by working with other outcomes to incorporate policies, plans, and incentives for reducing land conversion into workplans and projects needs to be added more to our management approaches. More focused actions items under Management Approach 2, 3, and 4 related to working with specific CBP partners and teams will be added to the next workplan. For Management Approach 2, we could add specific actions related to working with CBP groups, (LUWG, LGAC, Local Leadership, Communications Team, and Web Team) to distill information into effective materials for local practitioners who influence land use change. For Management Approach 3, we could add specific actions related to using the LGEI model for surveying local governments and getting education and outreach information to locals. For Management Approach 4, we could add specific actions related to working more directly with the Land Use Methods and Metrics outcome to sync rates of change with "tools" to help locals address vulnerabilities.

(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?

Work more directly with Land Use Methods and Metrics outcome to sync rates of change with "tools" identified to help locals address vulnerabilities. When engaging local governments, land conversion data for that area and "tools" leaders in that area can use should be packaged together.

Work with the Local Leadership Workgroup, LGAC, and the Communications Team is necessary for local government engagement, education, and outreach. These groups can help HWGIT staff distill information into effective materials for local practitioners who influence land use change. These groups and the LGEI model can help to determine preferences of the state and local governments and interest groups represented in the CBP for policy actions, incentives, and planning tools to be used to reduce land-use conversion in the Chesapeake Bay area.

This outcome relates to almost every outcome and CBP team. There is an opportunity to better integrate this outcome to other existing and completed products, tasks and actions. Moving forward the outcome would benefit from tying into existing efforts to meet multiple objectives. HWGIT Staff undertook an assessment of other efforts, reports, GIT funding projects and workplan actions that are related to this outcome (land use). Below is a summary of those efforts and actions:
- HW Forest Retention Study (GIT funding FY 2015 and 2016 – VA DOF)
  - Product: A toolbox of policy and planning options that could incentivize local officials to stimulate forestland retention
- Conservation Land Use Policy Toolkit (GIT funding FY 2016 – National Center for Smart Growth)
  - Provides local governments information about land use policy tools (existing policy options, incentives and planning tools) they can use to slow the conversion of farmland, forestland, and wetland
- Strategic outreach education program for local elected officials in the Chesapeake Bay Watershed – Ecologix Report - (GIT Funding FY 2016 – EcoLogix, Group, Local Leadership Outcome)
  - Provides recommendations for the design of a strategic outreach and education program for elected officials that will most cost-effectively achieve
- Landscape Factors Affecting SAV Abundance – SERC report

- Studied effects of watershed land use on SAV. Watersheds dominated by developed or agricultural lands have significantly lower SAV abundances than forested watersheds. More than 20% developed land has significant negative effects on SAV.
  - Role of Natural Landscape Features in the Fate and Transport of Nutrients and Sediment – HWGIT STAC Workshop - 2014
    - Provided recommendations for adjusting the Watershed Model nutrient and sediment loading rates of natural landscape features (forests, buffers, streams, wetlands) based on their ecological health/condition, management status, and landscape position
    - "key policy questions, like whether the TMDL's nutrient and sediment accounting system could be restructured to accommodate "crediting conservation," were not appropriate for treatment in a STAC workshop, but should be pursued through other means after the workshop's findings were reported."
  - Approach to Chesapeake Bay Land Use Policy Tasks – Tetra Tech Report, EPA funding 2015
    - Provides recommendations on how to achieve the Land Use Options Evaluations Outcome; outlines specific tasks that will meet the outcome
  - Brook Trout Declines with Land Cover Changes in Maryland – MD DNR, UMCES
    - Study found brook trout were almost never found in watersheds where impervious land cover exceeded 4%.
  - Healthy Watersheds workplan
    - Action 2.1 – Outreach: convey information on status of healthy watersheds to local stakeholders
    - Action 2.2 – Identify tools that may be used by local governments to protect healthy watersheds
  - Local Leadership workplan
    - Action 0.2 – Determine baseline and monitoring knowledge and capacity of local officials
    - Action 1.3 – Build capacity of local officials to implement watershed protection and restoration activities
    - Action 1.4 – Deliver watershed protection webinars to local officials
    - Action 3.1 – Review gaps in existing methods and approaches for transferring information to local officials
    - Action 4.1 – identify information which assist local officials in outcome implementation while meeting local resources, priorities, and goals
  - Protected Lands workplan
    - Action 1.1 – Carry out advocacy and education for elected officials to maintain and expand land protection programs
    - Action 1.3 – Develop new sources of land conservation financing such as private capital markets
  - Tree Canopy workplan
    - Action 1.3 – Provide UTC guidance/case studies/best practices to local governments
    - Action 2.1 – Review state and local policies to support UTC and provide recommendations on best practices, model ordinances, etc.
    - Action 2.2 – Support efforts to credit/incentivize tree canopy protection in the TMDL framework

- Action 3.1 – Provide guidance and training to help local governments develop UTC implementation programs
    - Brook Trout workplan
        - Action 1.1 – Communicate priority areas in the context of conservation planning to local decision makers
    - Fish Habitat workplan
        - Engage and communicate fish habitat with partners and stakeholders to communicate the value of habitat to people including ecosystem services

(8) What is needed from the Management Board to continue or accelerate your progress?

We ask Management Board members to **support integration of land use planning into existing CBP efforts**. This will address the gap of limited HWGIT capacity and knowledge without creating an additional workgroup, task force, or action team. Management Board can support the outcome by (1) letting subject matter experts present to your relevant groups; (2) increase collaboration and incorporate land use policies, plans, and incentives for reducing land conversion into your outcomes; and (3) tap into sources for local government engagement and outreach to provide content. HWGIT staff and subject experts will meet with groups to discuss and specify how these groups can support our outcome, collaborate with our outcome and other existing supporting CBP effort, and tap into sources.