# STAC WORKSHOPS:
## PROPOSAL SUBMISSIONS AND RFP REVIEW

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STAR Meeting – January 25, 2018

# Outline

- Quick overview of STAC workshops
- High Priority Topics for STAC
- The Planning Process – Expectations Before, During, & After
- Submitting a Successful Proposal
- RFP (Request for Proposals) Process & FY18 Timeline
- How to Apply

# What is a STAC workshop?

Workshops are a primary mechanism by which STAC…brings the broad expertise of the scientific and technical community to bear on critical and timely issues relevant to the successful restoration of the Chesapeake Bay

[…] gather critically needed scientific or technical information related to protection and restoration of Chesapeake Bay and its watershed.

Designed for consideration, review, and implementation of scientific information and science-based management in the restoration efforts of the Chesapeake Bay region.

# STAC workshops are used:

- To review the state of the science of a topic
- To identify important areas of research, technology development, or data collection and analysis – and suggest strategies to advance these efforts
- To investigate emerging scientific issues
- To be responsive to science-based questions from the CBP, and develop strategies in support improved science

# Each workshop is unique

- 1-3 days
- Range from 15 – 70 participants (Average ~40)
- Presentation series v. Break-out groups v. Group discussion

Structure will vary based on the (a) overarching goals, (b) intended audience, and (c) desired products of the workshop

# High Priority Topics for STAC

1. Contaminants of emerging concern
2. Adaptive management through continued monitoring
3. Applying systems thinking (integrating social/economic/ecological) to promote innovation and cost effectiveness
4. Strategies for connecting available science with local stakeholders/communities
5. Coupling ecosystem models and ecological services
6. Climate change and its impact on agriculture, nutrient loading, BMP resilience/effectiveness and TMDL achievement
7. Other pollutants and indicators necessary for restoration (other than N, P, sediment)
8. Uncertainty/sensitivity analysis in the modeling suite, and communicating uncertainty

# Potential areas for STAC/STAR engagement

- Ongoing development of STAC "Recommendations Database"
  - Users: Both STAC and the CBP
  - Best format/structure
  - Searchable?

- Enhancing effectiveness of STAC workshop products
  - Improve information access
  - Synthesizing and communicating results

# THE PLANNING PROCESS

## EXPECTATIONS BEFORE, DURING, & AFTER

# Forming a Steering Committee

- Up to 10 individuals, including:
  - ≥ 1 current STAC member who has agreed to participate
  - Representative from any entity with a particular relevance to the topic of resulting product
  - **Choose carefully!**
- Identify chair or co-chair(s)
  - Main point of contact with STAC Staff
  - Responsible for keeping the group engaged
- STAC Staff (*Not part of the 10)
  - Must be included in all correspondence
  - Logistical support

# The steering committee is responsible for oversight of all aspects of the workshop

**Before**

- Initial proposal
- Identifying effective group size + timing to meet workshop goals

**During**

- Developing workshop objectives and agenda
- Identifying key participants and speakers
- Developing pre-workshop materials (if applicable)
- Determining criteria for travel support (if applicable) within approved budget

**After**

- Development of workshop proceedings and their timely submission to STAC
- Identifying key recipients of workshop findings and recommendations (CBP GITs, Workgroups, etc.)
- Report-out of outcomes to STAC and/or CBP

# Timeline

- Workshops, (but not workshop products), must be completed in the fiscal year for which they are approved
  - *June 1, 2018 – May 31, 2019*

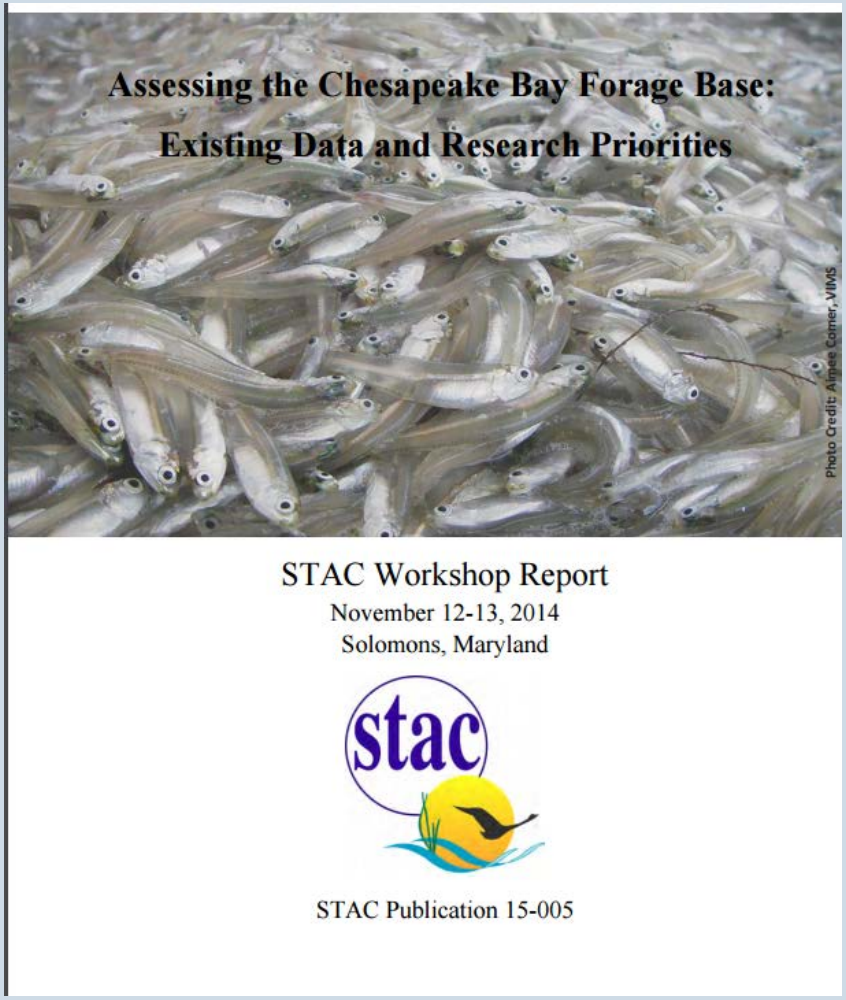
- Workshop planning typically takes 3 months (on average)
  - *Size and structure of workshop*
  - *Proposed time of year*
  - *Responsiveness of steering committee*
  - *Any deadlines for outcomes from workshop*

- Agenda should be finalized and invitations sent at least 1 month prior to workshop date

- Committee will hold calls ~every 2 weeks –less frequently closer to the workshop date

# Workshop Report

*Provides a format for formulating guidance from the scientific and technical community to the CBP Partnership*




- Steering committee develops written report on the workshop proceedings, including specific findings and recommendations
- Additional products (factsheets, press releases) welcome
- Due to STAC 90 days from the workshop date
- Reports go to the CBP (specifically, the Management Board)
  - *Actionable recommendations*

# Considerations for Effective Reports

- Plan with the products and the intended audience in mind
- Assign designated note-takers or facilitators
- Plan for the steering committee to meet directly following the workshop (or within a week after!)
- Have regular progress updates
- Gather summaries from presenters
- Schedule workshop updates at CBP meetings – deadlines help!

# SUBMITTING A SUCCESSFUL PROPOSAL

- **Scientific and technical merit (30%):** Do the workshop's objectives build on the current state of knowledge of the topic to be addressed? Does the workshop have the potential to make a positive contribution to the understanding of the current and/or future conditions of the Chesapeake Bay ecosystem and its management?
- **Relevance (30%):** Are the workshop's objectives and products clearly linked to science and management needs related to CBP goals and outcomes?
- **Suitability (20%):** Is a STAC workshop, rather than some other kind of activity (e.g., a peer review, technical report, or white paper), the appropriate vehicle for the proposed project? Will the proposed product(s) help the workshop outcomes to reach the intended audience in the best format for their effective and timely implementation?

- **Organization and planning (10%):** Does the proposal include a plan and timeline that clearly demonstrates that the workshop will likely achieve the stated objectives and complete the proposed products?
- **Steering Committee composition (10%):** Does the proposed workshop steering committee include the appropriate mix of qualified individuals to conduct the workshop, achieve the stated objectives, and complete the proposed products?

# Key Takeaways

- Scientific merit of objectives
  - *Specific scientific/technical questions to be addressed*
- Link between topic and CBP management needs
  - *Degree of urgency*
- Why is a STAC workshop the best format for this activity?
- Description of workshop outcomes and product(s)
  - *How likely is this activity to meet its goals*

# Proposal Requirements

- Refer to the RFP and STAC's Workshop Protocols for Proposal guidelines, format, and specific proposal requirements listed for either Proactive or Responsive Workshops.
- Two components – (1) Content and (2) Logistics/Budget
- ~ 3 pages
- Don't forget letter of support

# Timeline for Submission

| **Jan 31, 2018** | **Preliminary proposals due** |
|---|---|
| Feb 1 - Feb 5, 2018 | STAC Staff pre-screen proposals and provide comments |
| Feb 5, 2018 | Comments on draft proposals returned |
| Feb 16, 2018 | Final proposals due |
| Feb 28, 2018 | STAC Members submit proposal scores to STAC staff |
| Mar 2, 2018 | Proposal scores distributed to STAC members prior to March meeting |
| Mar 13-14, 2018 | STAC membership reviews proposals at quarterly meeting and select proposals to be funded and determine funding level |
| Jun 1, 2018 | Funds available for approved workshops |
| May 31, 2019 | Workshops must be completed by this date to receive funding |

Proposals received after the January 31 deadline may be considered if funding remains

# How to Apply – www.chesapeake.org/stac

# RFP and Protocols are available online

**Applying for Workshop Assistance**

STAC workshops provide a format for formulating recommendations from the scientific and technical community on information needs, opportunities for collaborations, and further management actions.

STAC releases a request for proposal to CBP partners in January of each year. All proposals are then presented to STAC and considered at a STAC quarterly meeting. Although proposals are accepted throughout the year, CBP representatives are encouraged to submit proposals to STAC as early as possible.

**Requesting a STAC Review**

STAC reviews provide thorough, competent, and objective technical guidance in a timely fashion to advise the CBP decision-making process.

Unlike workshops, STAC does not release a request for review proposals. Instead, STAC review requests are considered throughout the year as needs arise. Likewise, while there are a finite number of workshops STAC will accept each fiscal year, there is no set limit on the number of reviews the Committee will support as long as funding is available and STAC deems the review appropriate.

**GUIDANCE ON APPLYING FOR RESPONSIVE WORKSHOP ASSISTANCE**

The links provided below are to be used by CBP representatives seeking to apply for STAC responsive workshop assistance. Please submit all responsive workshop requests to STAC Staff.

- STAC Responsive Workshop RFP
- STAC Workshop Protocol
- STAC Publications Protocol
- Submit a Responsive Workshop Request to STAC

**GUIDANCE ON APPLYING FOR PROACTIVE WORKSHOP ASSISTANCE**

The links provided below are to be used by STAC members seeking to apply for STAC proactive workshop assistance. Please submit all proactive workshop requests to STAC Staff.

- STAC Proactive Workshop RFP
- STAC Workshop Protocol
- STAC Publications Protocol
- Submit a Proactive Workshop Request to STAC

# Questions?

**Contact Us:**

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# Extra Slides

# Who can apply?

As an advisory committee to the CBP, STAC reserves funds each year for both proactive and responsive workshops

## Proactive

- Comes from within STAC: individual or groups of STAC members
- Collaboration with current *ad hoc* workgroups in STAC, research institutions, or CBP partner

## Responsive

- Comes from CBP partner or committee: any Bay jurisdictions, GIT, LGAC, CAC, CBC, MB…etc.
- Must collaborate with/ include a current STAC member on steering committee
- Needs Letter of Support* with proposal

# Budget

- The total amount allocated by STAC will not exceed $10,000 for each workshop activity
  - *Typical cost between $5-10,000*
  - *STAC can support avg. 4-5 workshops per FY*

- External contributors/Matching Funds/Fiscal Partners? Great!
  - *Identified in the proposal*
  - *Outline any restrictions or limitations*

- Costs can only be applied to actual workshop expenses and services
  - *No international travel – U.S. Airlines only*
  - *Cannot support travel for Federal employees*

# Example – Fall workshop, approx. 30 participants

| **Estimated Budget** | | |
|---|---|---|
| **Venue** - $1,000 | **Catering** - $2,500 | **Travel Support** - $6,500 |
| **Total Requested from STAC** | **$10,000** | |

- Budget Considerations
  - *Time of year*
  - *Location (see also: time of year)*
  - *# of expected participants*
  - *Length of workshop*
  - *Travel for key participants/speakers*

# Reports are due to STAC 90 days from the workshop date

1. Steering committee drafts report
2. STAC Staff conducts an editorial review, checking for grammar, style, and formatting
3. 1-week review by workshop participants (optional)
4. 1-week review by STAC
5. Final review by STAC Coordinator/Executive Secretary
6. Final report is distributed to the CBP Management Board, workshop participants, and posted on the STAC website

**All STAC reports can be found on our website, at chesapeake.org/stac*