

Status and Trends Workgroup: 2018 Workplan

Under the Scientific, Technical Assessment and Reporting (STAR) Team of the Chesapeake Bay Program (CBP)

The Indicators Framework Action Team conducted work in 2015 culminating in a revised [Indicators Framework](#), [Indicator Management Process](#), and a recommendation to re-convene the Status and Trends workgroup under STAR to evaluate our indicator and information needs to support adaptively managing and communicating our progress toward the Bay Watershed Agreement. These findings were [approved by the Management Board](#) in November 2015. The following outlines the mission, scope of work, partners, and key actions of this workgroup.

Mission

- A. ~~Enforce-Ensure~~ the integrity of the Indicators Framework by ~~ensuring-focusing~~ the development and use of information in the CBP ~~aligns~~ with the principles described in the Framework.
- B. ~~Foster cross-outcome collaboration among~~ ~~Work with~~ the Goal Implementation Teams (GITs) ~~on~~ ~~to~~ ~~identify~~ ~~yed~~ information needed to track progress toward and adaptively manage achievement of goals and outcomes ~~and foster cross-outcome collaboration.~~
- C. ~~Ensure up-to-date indicators for Partnership products that appropriately communicate our work.~~ Staff the indicators management process.

Commented [FL1]: Workgroup members: note the shift in mission here, from “identify needs” to “work collaboratively on identified needs”, per our discussion about our “added value” as a workgroup

Commented [FL2]: This doesn't seem to be something that the workgroup per se has helped with in the past year. Members of the workgroup do this as part of their job function, not as part of workgroup membership.

Scope of Work

- Ensure Chesapeake Bay Program suite of indicators link directly to Agreement outcomes using the Indicators Framework. Work with GITs to change or redefine previously approved indicators to adhere to the Framework.
- ~~Use~~ the Indicators Framework to guide development of indicators. Develop clearly defined criteria to assist the GITs in developing and refining indicators and understanding the relationship between the information types in the Framework.
- ~~Use Indicators Framework to~~
 - o ~~highlight commonalities among proposed indicators or identified needs across outcomes~~
 - o ~~illustrate the different roles the same indicator can play in multiple outcomes or GITs~~ ~~Identify indicator gaps using the Framework.~~
- Offer guidance to GIT coordinators and staffers seeking to develop new indicators. ~~Discuss and vet ideas for proposed new indicators. Offer other assistance,~~ as available and appropriate. ~~Support efforts currently underway to develop new indicators.~~
- Ensure appropriate management of indicators not connected to Agreement outcomes.
- Manage the process of sunsetting old indicators.
- ~~Recognize links among existing indicators: use framework to identify how some indicators provide information that supports multiple outcomes (e.g., performance indicators for one outcome may be an influencing factor indicator for another outcome).~~

Commented [FL3]: Shift in work per shift in Mission area 2 above.

Commented [FL4]: Shift in work per shift in Mission area 2 above.

Workgroup Membership

The workgroup includes core members and interested parties. Both groups receive updates and upcoming meeting information, and both groups are invited to attend workgroup meetings. The core membership will set the priorities of the work group, develop the annual work plan, and attend the workgroup meetings regularly, while interested parties will provide input relevant to their area of expertise, and should review agendas for upcoming meetings to decide their participation based on the issues or indicators to be discussed. Core members will fulfill the roles below:

- ChesapeakeStat representative(s): advise on data visualization and communication via [ChesapeakeProgress](#). Make sure workgroup actions and products align with the development of yet undefined Program-wide decision-making products.
- Communications Director: use stories to connect different indicators. Make sure workgroup is aware of what different audiences are looking to understand from Partnership indicators and progress. Advise workgroup on ways to best communicate indicator updates.
- Cross-GIT Coordinator: make better connections and facilitate better storytelling across the Program. Advise workgroup on participation in biennial review process.
- GIS Lead: Coordinate mapping of indicators – the updating of existing maps and the development of new maps. Work with workgroup members, partners and GITs to meet their indicator-based geospatial needs.
- Indicators Coordinator: In addition to facilitating the Status & Trends workgroup, the Indicators Coordinator brings up-to-date knowledge about indicators being updated or developed from existing responsibilities of managing regular indicator updates and facilitating the indicators management process.
- Monitoring representative: advise workgroup on considering monitoring needs and opportunities in the development of new indicators.
- STAR Analyst: support the workgroup and GIT leads in developing new indicators. Contribute expertise in statistics, monitoring, and analysis.
- STAR Coordinator: connect workgroup and GIT leads developing new indicators with science providers through STAR. Find experts and provide in house support for indicator development. Build the capacity of the Program to develop, analyze and understand indicators and trends.
- Web Team representative: ensure that the workgroup activities and products align with Partnership current web products.

GIT coordinators and staffers may not attend every meeting but are important members of the workgroup. They bring experience in developing and managing indicators within their goal team to share with other GITs through this workgroup. They will also supply the content for stories that link indicators across goals and outcomes. GIT coordinators and staffers will participate in workgroup meetings according to the agenda topics for each meeting.

Commented [FL5]: Can workgroup members review and provide input on whether their role is still appropriate?

Other interested parties include Communications Workgroup leadership, indicator data providers, STAR leadership, state monitoring program representatives, representatives from the Susquehanna River Basin Commission (SRBC) and Interstate Commission on the Potomac River Basin (ICPRB), and Bay Program managers.

Partners of the Workgroup

Communications Workgroup: ~~to help inform the activities of the CBP Communications Office, the Communications Workgroup discusses~~ the merits of different ~~messages that can be pulled out of sets of data or information that could be used to communicate our progress (to oversight groups, to the public, etc.) and works with the Communications Team to inform the ways we might effectively~~ coordinate the updates of or storytelling around single or groups of indicators (whether it is for internal communications—e.g., biennial review process—or external communications).

STAC: uses its reach of scientific and technical experts to advise on and address Partnership information needs; advise on adaptive management; and provide guidance or advice to bring the best possible science to bear on identified issues.

STAR: discuss and prioritize GIT needs and provide input on workplan of the Status & Trends workgroup. Identify science providers and facilitate science expertise and a connection to other related STAR workgroups. Provide a forum for the Status & Trends workgroup to seek input from GIT Coordinators and Staffers.

Key Actions

**Note: Items with an asterisk indicate that taking the action is contingent upon group discussion and consensus that determines the action would be helpful or necessary.*

To the extent possible, meeting agendas will be organized around specific issues or stories and designed to foster cross-outcome collaboration. ~~These meetings will likely be used to assist GITs in preparing for the biennial review.~~

Action Number	Action	Mission Area	Timeframe (Calendar Year)	Lead	Status
	Define the Universe	2			
	• Identify which outcomes in the Agreement are measurable (and which are not)		_____	_____	Completed May 2016 Coordinators & Staffers
	• Come to agreement on treatment of these different parts.		_____	_____	Completed June 2016 Status & Trends

Commented [FL6]: STAR is filling this role. One way I could see Status & Trends playing a bigger role in SRS is with the Progress presentations that Catherine and I give—

Commented [FL7R6]: Laura to follow up with Stewardship outcome leads regarding how we collaborated on Progress presentation—did this work for you?

	Create Program Examples of Indicators Framework in Action	2		Laura Free	<i>Information needed to adaptively manage is being organized through the logic table. Not in 2018 workplan.</i>
	<ul style="list-style-type: none"> Select subset of Outcomes where completing an Indicators Framework could act as an example across the Program 		Q4 2016	STAC members (Carl Hershner, Kirk Havens, and Denise Wardrop)	
	<ul style="list-style-type: none"> Identify existing or nonexistent indicators or metrics to complete the Indicators Framework for that subset of Outcomes. 		Q4 2016	STAC members (Carl Hershner, Kirk Havens, and Denise Wardrop)	
1	Develop guiding questions to assist GITs in developing indicators in each of the categories of the Indicators Framework	A	<u>Q1 2018 (January)</u>	Laura Free and Peter Tango	<i>Peter and Laura have an initial list ready to share with the workgroup.</i>
2	Confirm and codify <u>document</u> plans related to development of any revised/new indicators <u>to provide increased accountability and predictability</u> , including ...	C	Ongoing	Laura Free	
	<ul style="list-style-type: none"> Sustainable Schools 		Q4 2016	(Kevin Schabow)	January 10, 2017
	<ul style="list-style-type: none"> Diversity 		Q4 2016	(Darius Stanton and Reggie Parrish)	January 10, 2017
	<ul style="list-style-type: none"> Environmental Literacy Planning 		Q1 2017	(Shannon Sprague)	
	<ul style="list-style-type: none"> Oysters 		Q1 2017	(Emilie Franke, Bruce Vogt, and Kara Skipper)	
	<ul style="list-style-type: none"> Student MWEEs 		Q2 2017	(Shannon Sprague)	
	<ul style="list-style-type: none"> Climate Resiliency 		<u>Ongoing Q1 2018</u>	(Zoe Johnson)	
	<ul style="list-style-type: none"> Local Leadership 		<u>Ongoing Q1 2018</u>	(Mary Gattis and Reggie Parrish)	

Commented [FL8]: We're not really codifying the plans, but documenting the schedule could increase accountability of workgroups and predictability for the partnership. I could come up with a general workflow that could be tweaked for each indicator and dependent on how much we know. For example, I could think through a timeline for Local Leadership that would include very vague details that could be specified as we get more information about what that indicator will look like.

Updated November 30, 2017

	<ul style="list-style-type: none"> Stream Health 		Q2 2017 Q1 2018	(Jennifer Greiner and Kyle Runion Margot Cumming)	
	<ul style="list-style-type: none"> Tree Canopy 		Q2 2017 Q2 2018	(Julie Mawhorter)	
	<ul style="list-style-type: none"> Brook Trout 		Q2 2017 Q2 2018	(Jennifer Greiner and Paige Hobough)	
	<ul style="list-style-type: none"> Black Duck (Habitat-based indicator) 		Q2 2018	(Jennifer Greiner and Paige Hobough)	
	<ul style="list-style-type: none"> Stewardship 		Ongoing	(Amy Handen and Drew Pizzala)	
	<ul style="list-style-type: none"> Toxic Contaminants Policy and Prevention 		Ongoing	(Greg Allen)	
	<ul style="list-style-type: none"> Water Quality Standards Attainment (addition to current indicator) 		Q3 2018	Peter Tango and Qian Zhang	Update was presented to S&T workgroup in June 2017
	<ul style="list-style-type: none"> Healthy Watersheds 		Q3 2018	Renee Thompson and Katherine Wares	
	<ul style="list-style-type: none"> Forage Fish 		Q3 2018	Bruce Vogt	
	<ul style="list-style-type: none"> (other indicators to be added as needs are identified). 		Ongoing	-----	
	Align Current Indicators to Indicators Framework	1		Laura Free	
	<ul style="list-style-type: none"> Identify current indicators that are not linked to an Agreement Outcome 		Q2 2017		
	<ul style="list-style-type: none"> Identify indicators that require support to adapt to the Framework 		Q3 2017		
	<ul style="list-style-type: none"> Work with GIT Coordinators to suggest changes or alternatives as needed 		Q3 2017		
	<ul style="list-style-type: none"> Identify indicators that are no longer needed or relevant to support work of the Watershed Agreement 		Q3 2017		

Commented [FL9]: Laura confirmed that the workgroup is no longer intending to change this existing indicator at this time

	<ul style="list-style-type: none"> Work with GITs to sunset these indicators or, if appropriate, transition them to other CBP products. 		Q4 2017	Catherine Krikstan	
3	Formulate Prioritized List of Needed Indicators of Factors Influencing Our Work	B		Laura Free and Peter Tango	
	<ul style="list-style-type: none"> Engage STAC members on approach to identification of needs (e.g., this section of workplan) 		Q4 2016	Laura Free	
	<ul style="list-style-type: none"> Create a high level summary of current and needed indicators of all types 		Q4 2016	STAC members (Carl, Kirk, Denice)	
	<ul style="list-style-type: none"> Synthesize previous work by Catherine Krikstan, John Wolf, and others to analyze for commonalities among needs for Factors influencing indicators based on factors identified in current (version 1.0) Management Strategies 		Q4 2016 Q1 2018	STAC members (Carl, Kirk, Denice)	
	<ul style="list-style-type: none"> Engage STAC on prioritization of factors influencing indicator acquisition in light of adaptive management needs and based on guiding questions developed under action 1 of this work plan. 		Q1 2018		
	<ul style="list-style-type: none"> Develop prioritization plan or criteria to be applied to a to-be-created list of factors influencing indicator needs. <ul style="list-style-type: none"> Use guiding questions developed under action 1 of this work plan. Criteria to consider include (a) whether data gathering is possible and (b) whether it would support adaptive management 		Q2 2018		
	<ul style="list-style-type: none"> Obtain feedback from workgroups and GITs who revise work plans and management strategies in March 2018 regarding how to identify the most critical factors for each management strategy. <ul style="list-style-type: none"> By March, 14 outcomes in almost all of the goal teams will have gone through SRS. Options to engage other 16 outcomes include: 		Q2 2018		

	<ul style="list-style-type: none"> ▪ <u>Waiting until first cycle of SRS is complete (2019) – not recommended</u> ▪ <u>Engaging other teams on their critical factors outside of the SRS</u> 				
	<ul style="list-style-type: none"> • <u>Compare “critical” factors among themselves and to “common” factors – what are the overlaps?</u> 		<u>Q3 2018</u>		
	<ul style="list-style-type: none"> • <u>Based on these overlaps, work with GITs to identify needed indicators of all types: performance indicators, factors influencing indicators, and output indicators (workplan activities)</u> 		<u>Q1 2017Fall (Q4) 2018</u>		
	<ul style="list-style-type: none"> • <u>Engage STAC on prioritization of indicator acquisition in light of adaptive management needs, including influencing factors pieces</u> 		<u>Q2 2017</u>		
	<ul style="list-style-type: none"> • <u>Consider whether filling information gaps (a) is possible and (b) would support adaptive management</u> 		<u>Q3 2017</u>		
	<ul style="list-style-type: none"> • <u>Update and refine prioritized list of current and needed factors influencing indicators for all types (performance, factors influencing, and output)</u> 		<u>Q3 2017Winter (Q4 2018-Q1 2019)</u>		
	<ul style="list-style-type: none"> • <u>Develop prioritization plan or criteria and apply to our list of indicator needs.</u> 		<u>Q4 2017</u>		
4	Use prioritized list to highlight needed information to groups within CBP, e.g. STAR and STAC	B	<u>Winter (Q4 2018-Q1 2019)Q4 2017</u>	Laura Free and Peter Tango	
	<u>Build the capacity of the Program to develop and maintain indicators through partnerships with STAR and STAC</u>	<u>2, 3</u>	<u>Ongoing</u>	<u>Peter Tango</u>	
	<ul style="list-style-type: none"> • <u>Work with STAR and STAC to address priorities through appropriate mechanisms. For example, help facilitate structured workshops (“Apollo 13” roundtables) with subject matter experts to identify existing capacity to address a specific need.</u> 		<u>Q4 2017</u>		
5	Work with GITs, ChesapeakeStat Team and Communications Team to ensure progress is being tracked toward non-measurable parts of outcomes.	C	Ongoing	Catherine Krikstan	

Commented [FL10]: I think this would be included in the prioritization plan, so have deleted it as a separate action

Commented [FL11]: This work is not ripe for us right now but could be included in future work plan.

	<p>At minimum, assess progress toward these actions when the relevant outcome is reviewed through the Biennial Strategy Review System Review Process.</p> <ul style="list-style-type: none"> • Determine if “non-measurable” categorization is still appropriate. • Recalibrate list of indicator needs as appropriate. 				
6	Encourage use of indicators in adaptive management through biennial review process			Kristin Saunders	
	<ul style="list-style-type: none"> • Work with Communications team GITs to identify stories common factors and relationships among outcomes to showcase or examine in biennial reviews 	B	Ongoing	Rachel Felver Catherine Krikstan	Working with Laura Free
	<ul style="list-style-type: none"> • Help GITs prepare for biennial reviews Explore whether Status & Trends has the expertise to help workgroups and GITs determine appropriate trajectories, confidence intervals and decision thresholds, based on their existing indicators and targets 	B	Ongoing Q1 2018	Laura Free	
	<ul style="list-style-type: none"> • Work with STAR to determine how the partnership can address this adaptive management need 		Q2 2018	Peter Tango	
	<ul style="list-style-type: none"> • Support GITs in using existing indicators to make determinations about progress 	2	Ongoing	Laura Free	
	<ul style="list-style-type: none"> • Encourage use of the Indicators Framework to identify other information needs 	B	Ongoing	Laura Free	
	<ul style="list-style-type: none"> • Work with information needs identified in biennial review process to determine if indicator is needed and, if so, guide GIT through indicator development process 	All	Ongoing	Laura Free	
	<ul style="list-style-type: none"> • Frame biennial review process as an opportunity to gauge Outputs (workplan activities) and their relationship to achievement of the overall Outcome. 	A	Ongoing	Kristin Saunders	

Commented [FL12]: This would likely come out through the SRS and thus be captured in item 6

Commented [FL13]: I am doing this but as Indicators Coordinator, not as part of this workgroup