

Chesapeake Bay Program Biennial Strategy Review System

The Chesapeake Bay Program's "Biennial Strategy Review System" (SRS) is the adaptive management-based implementation process by which the Partnership seeks to meet its *Chesapeake Bay Watershed Agreement* commitment:

"Goal Implementation Teams will re-evaluate biennially and update strategies as necessary, with attention to changing environmental and economic conditions. Partners may identify policy changes to address these conditions and minimize obstacles to achieve the Outcomes."

As designed, the SRS is a two-year process during which the Partnership will review progress on each Watershed Agreement Outcome; identify what is working and what is not; consider recent developments in the scientific, fiscal, and policy arenas; adjust our Two-Year Workplans and Management Strategies as appropriate; and develop the next set of Two-Year Workplans. The objective is to improve our effectiveness in achieving our Watershed Agreement Goals and Outcomes. The SRS is not intended to focus on where we are falling short, but rather on how we can better work together and support each other to improve our collective success."

The SRS begins with a "Two-Day Biennial Review Meeting" designed to be (1) a broad review of where and why we have and have not made progress in achieving our Outcomes over the previous two years, and (2) an identification of recent issues and developments in the scientific, fiscal, and policy arenas that impact Outcome achievement. Issues identified at the Two-Day Biennial Review Meeting will inform the more detailed Outcome reviews and discussions that will take place at the "Quarterly Progress Meetings" over the next two years. The Quarterly Progress Meetings are meetings of the Management Board during which progress on individual Outcomes is reviewed, necessary changes are identified, and, where appropriate, a new Two-Year Workplan is approved. Each Watershed Agreement Outcome will receive individual attention from the Management Board over this two-year time period. This process will be repeated every two years.

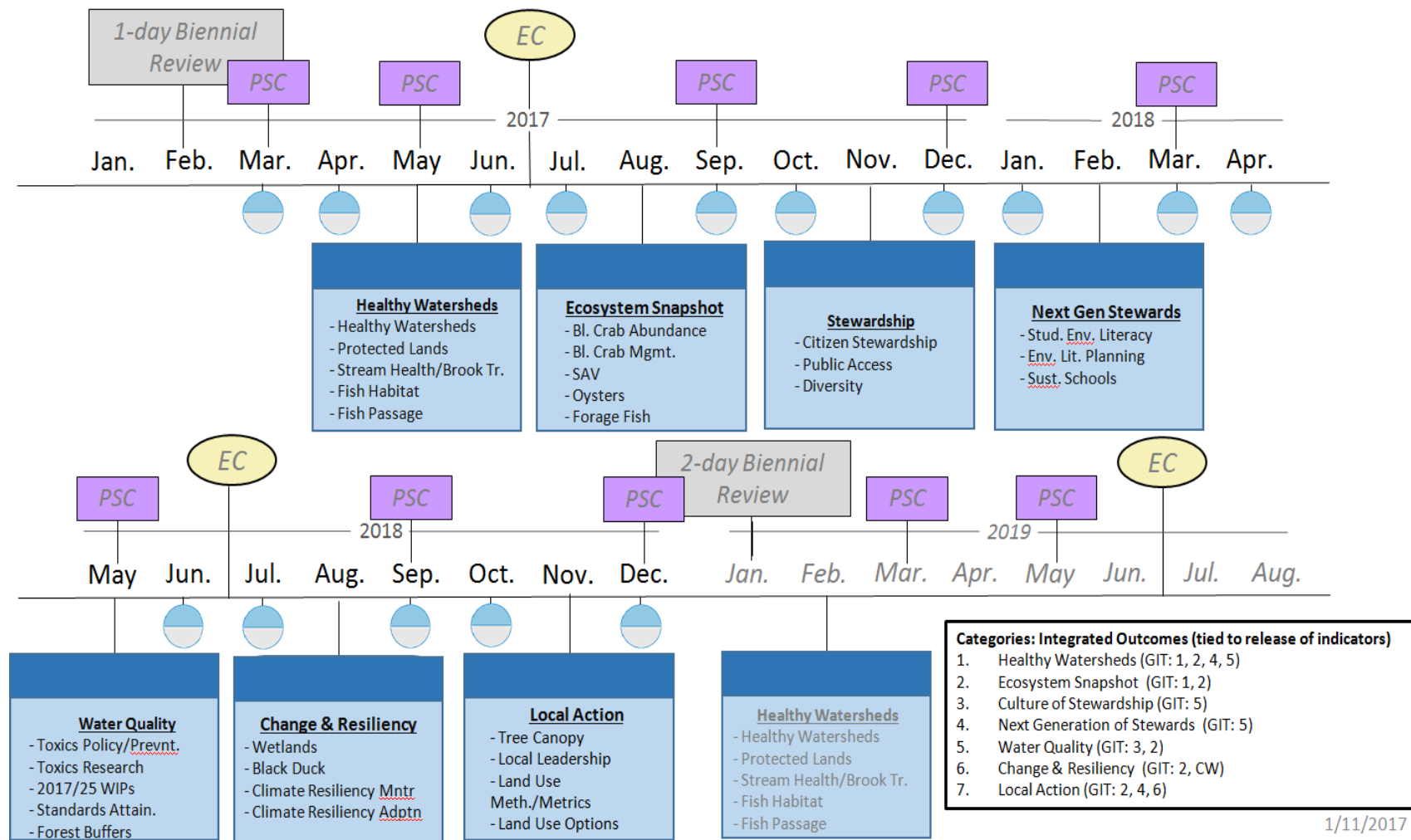
The majority of the work involved in the SRS will be conducted by the Management Board and Goal Implementation Teams (GITs) during the Quarterly Progress Meetings. However, the SRS is not intended to exclude other groups. To the contrary, it is intended to be an inclusive process open to all. In particular, the flow of information between the Management Board and Principals' Staff Committee (PSC) that will occur throughout this process will need to be a two-way street. Results and actions from the Two-Day Biennial Review Meeting and Quarterly Progress Meetings will be provided regularly to the PSC, and all resulting input and feedback from the PSC will be disseminated to the Management Board, GITs, and other appropriate groups.

The remainder of this document provides brief descriptions of the major components of the SRS process:

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It is important to view the information below as a work in progress. The current version of the SRS is the result of many conversations with many partners over many months. Two conclusions are inevitable from those conversations: First, many partners care deeply about this process and have devoted much time and effort to making it work. Second, what follows is not perfect. Our goal was not to design a perfect process, but rather to design a process that was good enough to get started – and we have done that. We will be flexible and improve as we move forward.

2017 / 2018 Biennial Strategy Review System: Timeline



2017 / 2018 Biennial Strategy Review System: Key

2-Day Biennial
Review

Time-sensitive Topics

GIT Progress
MB Sessions



PSC

EC

Biennial Review Meeting – High-level retrospective program-wide review to celebrate our successes and identify important stories. A broad identification and discussion of general themes in the implementation, scientific, fiscal, and policy fields that will be used to inform the review and possible modification of individual Outcome discussions over the next two years. Summarize recommendations to be reported to the PSC.

Management Board Quarterly Progress Meetings – Review Management Strategy and Workplan progress of individual Outcomes grouped by theme; highlighting successes, challenges and obstacles. Identify necessary changes and approve next 2-Year Workplan.

Interim Management Board Meetings – Standard MB meetings. As needed, follow-up on issues identified in Quarterly Progress Meetings, new issues related to challenges or strategy shifts.

Principals' Staff Committee – Provide input on any significant shifts in strategy and approval of changes, with public input, resulting from the Biennial Review to prepare for PSC report on implementation progress to the Executive Council.

Executive Council – Concurrence and partner commitment to significant strategy shifts and discussion and approval of changes, if necessary.

Two-Day Biennial Review Meetings

Purpose / Goal: Identify broad scientific, fiscal, policy, and implementation themes and issues that the Chesapeake Bay Program Partnership will consider in adaptively managing our work over the next two years. This high-level review will be designed to improve the success and efficiency of meeting our Watershed Agreement Outcomes. This meeting will be led by the Management Board (MB) and directly support the Principals' Staff Committee's (PSC) needs, as articulated in the Watershed Agreement.

When: Two-day meeting held at the beginning of each biennial review cycle (i.e., nominally in January of odd years).

Who: Open meeting with emphasis on attendance by Management Board Leaders and Members, Outcome Leaders (Goal Implementation Team (GIT) or Workgroup Leaders), Advisory Committee Chairs, and the Scientific, Technical Assessment & Reporting (STAR) Team.

Guiding Questions:

1. In general, are we successfully implementing our Workplans at a pace that is reasonably likely to achieve our Watershed Agreement Outcomes? In what areas are we succeeding and in what areas are we falling short?
 2. Have external, influential factors (e.g., our scientific understanding; technological developments; fiscal resources; finance options; or legal, regulatory, or policy boundaries) changed sufficiently to warrant changes to our Management Strategies or Workplans?
 3. Have external program reviews identified needed Partnership action(s) to foster progress toward our Outcomes?
 4. What opportunities and obstacles exist to improve or hinder cross-GIT collaboration or yield multiple benefits across Outcomes?
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Objectives:

1. Identify lessons learned based on a broad retrospective review of Watershed Agreement implementation over the previous two years.
 2. Identify observed and anticipated changes in scientific understanding/technical developments, funding sources, and legal/regulatory/policy initiatives that the MB and GITs should consider to modify Management Strategies and foster progress over the next two years.
 3. Identify necessary actions to improve success of Management Strategy and Workplan implementation based on External Program evaluations.
 4. Facilitate the implementation of cross-cutting, multi-GIT actions that will positively impact progress toward multiple Outcomes.
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Inputs:

1. **Our Performance:** In what general areas are we ahead of schedule, on schedule, or behind schedule for meeting our Watershed Agreement Outcomes? What are the common themes or reasons for our being ahead of or behind schedule?
2. **External Factors:** What external factors have recently changed or are expected to change in the near future in the scientific, fiscal, and policy arenas that are or will influence our success? If we are successful at meeting our Watershed Agreement Outcomes, do we expect these successes to have the intended impacts, or has our understanding of how the system will respond changed?
3. **Appropriate Responses:** Based on the above, what general issues or themes should we keep in mind when evaluating progress and identifying possible modifications to our Management Strategies or Workplans over the next two years?

Outputs:

1. Shared understanding of effective actions and strategies that should be replicated, ineffective actions and strategies that should be avoided, and new ideas and innovations that can be incorporated into management approaches.
2. Recommendations of scientific and technical, fiscal, and policy developments that the Partnership should consider in its review of assumptions surrounding the factors influencing our progress and the prioritization thereof, and in its modification of management approaches, as appropriate.
3. Recommendations of needed changes to resource allocations.
4. Recommendations to guide program evaluations.
5. Recommendations of topics that need further discussion at Quarterly Progress Meetings.
6. Information to guide the PSC's completion of its "Strategy Information Report" to the Executive Council.

Process: The first Two-Day Biennial Review Meeting will occur on February 8 & 9, 2017, in Cambridge, Md. This meeting will differ from subsequent Two-Day Biennial Review Meetings (to take place in 2019, 2021, etc.), in the respect that we will not have two years' of previous Quarterly Progress Meetings to review and inform what has and has not been working in our Outcome implementation. Future meetings will provide a greater opportunity to explore lessons learned.

Quarterly Progress Meetings

Purpose / Goal: To improve the success of meeting our individual Watershed Agreement commitments through (1) the collective review of progress on individual Outcomes, (2) the application of new understandings and opportunities identified during the most recent Biennial Review Meeting or elsewhere, and (3) the resulting implementation of necessary adaptations to our current or next round of Management Strategies and Two-Year Workplans.

A Quarterly Progress Meeting's discussions and decisions will inform whether a GIT will need to draft and seek approval of an Outcome's new Two-Year Workplan at the following Quarterly Progress Meeting. As a result, all Watershed Agreement 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 end with its biennial Quarterly Progress Meeting.

When: Quarterly Management Board meetings.

Who: Management Board Leaders and Members, Outcome Leaders (Goal Implementation Team (GIT) or Workgroup Leaders), Advisory Committee Chairs, and invited outside experts.

Guiding Questions:

1. Are we on pace to meet our Watershed Agreement Outcome by the predetermined date?
 2. What obstacles could block us from meeting our Outcome and what potential solutions could help us overcome these obstacles?
 3. What new opportunities have presented themselves and how can our Management Strategies and Workplans be modified to take advantage of these opportunities?
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Objectives:

1. Assess implementation: Are we doing what we said we would do? Are we getting the results we expected?
 2. Update our understanding of the system. What is working? What is not working? What new developments or understandings have occurred since our work began?
 3. Identify potential adjustments justified by the current assessment. What, if any, changes to our Management Strategies and Workplans are warranted based on our evaluation?
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Inputs:

1. Are we on a trajectory to achieve our Outcome?
2. How successfully have we implemented our current Two-Year Workplan?
 - a. Where are we exceeding expectations and why?
 - b. Where are we falling short of expectations and why?
 - c. What new developments or understandings have occurred that were not taken into consideration when the Workplan was developed?

- d. How are we succeeding or struggling in managing the factors that influence our ability to achieve our outcome?
 - e. Are there factors influencing our ability to achieve our outcome that we did not expect? Can we manage or account for these factors in some way?
 3. What changes are required to the next Two-Year Workplan? What new or existing partners do we need to reach out to in order to improve our chances of success?
 4. What information can be gleaned from the Chesapeake Bay Program's conservation and restoration maps?
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Outputs:

1. Updated understanding of the system.
 - a. Specification of new factors, new collaborators, and new or changed assumptions.
 - b. Specification of new response expectations and/or uncertainty (new decision thresholds).
 2. Recommendations for Management Strategy adaptation and any change in resources. This includes needed cross-GIT and/or external program coordination.
 3. Approved new Two-Year Workplan.
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Process:

Pre-Quarterly Progress Meeting Process:

4 Weeks Prior to Quarterly Progress Meeting: Lead GIT submits completed Template (currently under development) to the Enhance Partnering, Leadership and Management GIT (GIT 6). GIT 6 reviews and works with Lead GIT to clarify any issues or questions.

2 Weeks Prior to Quarterly Progress Meeting: GIT 6 submits completed template (including reviewer comments) to MB, Advisory Committees, and outside experts.

Quarterly Progress Meeting Process: Chair of Lead GIT provides brief summary of Template submission and responds to any questions. Chair of MB leads discussion based on the following three questions:

1. What, if any, are the most important short-term actions that can be implemented to address those actions that are behind in the current Two-Year Workplan?
2. What, if any, actions should be considered for the next Two-Year Workplan or for updates to the Management Strategy?
3. Is there any need to consider recommending a modification of the Outcome to the PSC? If so, how?

Post-Quarterly Progress Meeting Process: MB Coordinator and Staffers, Lead GIT Chair, and GIT 6 Chair work to finalize all Action Items. Action Items, including a new Two-Year Workplan, are to be submitted to the MB for their approval at the following Quarterly Progress Meeting (90 days).

Note: Each Outcome is scheduled to be reviewed and discussed biennially at a Quarterly Progress Meeting. However, if high-priority issues arise in the interim, the MB has directed the GITs to bring those items to their attention immediately for discussion at the next MB meeting, rather than wait until the next scheduled Quarterly Progress Meeting.