

Quarterly Progress Meeting Outcome Review Summary

This document will help you prepare for your Quarterly Progress Meeting and provide the Management Board with the information they need to discuss progress toward your outcome. You will provide this document in Step 5 of the Strategy Review System process. You may use this document for your Dry run in Step 4 and your presentation to the MB in Step 6. Optionally, you may summarize with a PPT.

Preparing for your 4th Cycle Quarterly Progress Review

Three Months Before

Materials: Current Logic & Action Plan

In preparation for Step 3, review the actions in your current Logic & Action Plan and highlight each as Green/Yellow/Red according to its status. Next complete the “Looking Back: Learning from the Last Two Years” section below.

Looking Back: Learning from the Last Two Years

Celebrate our Accomplishments & Best Practices

1. Since your last QPM, what key successes would you like to highlight to the Management Board?
NOTE: This is not intended to be a comprehensive review of the green actions in your action plan. Reflect on what you will continue in your post-QPM work/action plan.

Evaluate our Progress

NOTE: Your responses related to outlook and recent progress will be used to update your outcome page on [ChesapeakeProgress](#) and the [outcome status page](#).

2. Are we, as a partnership, making progress at a rate that is necessary to achieve this outcome? Would you define our **outlook** as on course, off course, uncertain, or completed? Upon what basis are you forecasting this outlook?
3. How would you summarize your **recent progress** toward achieving your outcome (since your last QPM)? If you don't have an indicator, would you characterize this progress as an increase, decrease, no change, or completed? (*Tip: If you have an indicator and it was updated since your last QPM, use your answer to question 16 from your Analysis and Methods document.*)

Lessons Learned

4. If our outlook is off course, what has been the most critical influencing factor or gap that needs to be addressed to accelerate progress?
5. For “red” actions, what is preventing us from taking action? Are these actions still needed?
6. What have we learned over the past two years that we'll need to consider in the coming two years?

8 Weeks Before

Materials: Management Strategy, Current Logic & Action Plan with completed G/Y/R analysis, Outcome Review Summary

Step 3: Meet with STAC/STAC to review and populate as much of the next two sections as possible.

Assessing our Efforts and Gaps

Reflection: Review the factors currently identified in your Management Strategy as influencing our ability to meet our outcome by reflecting on the following questions. What influences our success or our effectiveness in meeting our outcome? What has limited our ability as a Partnership (or GIT/workgroup) to get this work done? Update your Management Strategy if anything has changed.

Factors

7. Summarize here any newly identified influencing factors, and why they were added to your Management Strategy. If any factors have been deleted, are they the result of our actions, and what have we learned as a result?
8. Prioritize and summarize here the factors best tackled as a Partnership (or GIT/workgroup), that have the greatest impact to achieve our outcome.

Gaps

9. For those high priority factors summarized above, what is getting in the way of addressing them or what gaps continue to exist despite the current efforts to address those factors?

Focusing on the Next Two Years: Actions and Needed Support

10. Describe any scientific (including the impacts of climate change), fiscal, or policy-related developments that have already or may influence your work over the next two years.
11. Based on these developments and the learning discussed in the previous sections, summarize any new actions you are planning to address these gaps over the next two years.
12. Have you identified new needs, or have previously unmet needs, that are beyond the ability of your group to meet and, therefore, you need the assistance of the Management Board to achieve?

If yes, provide any detail that would assist the Management Board in assessing this need.

An optional approach for providing this information is to use the SPURR thought model.

- ***Specific and actionable need***
 - ***Programmatic partner***
 - ***Urgency of the needed action***
 - ***Risk of not acting***
 - ***Resources required.***
13. What steps are you continuing, or can you take, to ensure your actions and work will be equitably distributed and focused in geographic areas and communities that have been underserved in the past?

After your Quarterly Progress Review Meeting

12 Weeks After

Materials: Management Strategy and Work Plan

Step 8: These are the materials described in Step 8 of the SRS process.

Management Strategy

Since your Management Strategy currently includes the logic portion of the previously used Logic & Action Plan, it will serve to illustrate the link between the factors that could impact the partnership's ability to achieve an outcome and the actions it is taking to manage them.

Update your Management Strategy to reflect relevant information from your review and responses to the preparation questions for your Quarterly Progress Meeting.

Work Plan

NOTE: You have the flexibility to choose the format for this information. You can use a table, XL spreadsheet or some other option.

This will replace the Actions section of the previously used Logic & Action Plan. The first four listed questions provide the previously requested information. The last three questions ensure you have the necessary information to assess and learn from the results of your actions and will help guide your future work.

Develop your work plan by answering the following for each **action**:

- *What are the steps needed for each action?*
- *Who are the responsible parties?*
- *What is the impacted geographic location?*
- *What is the expected timeline for completion?*
- *What are the goals or metrics you will use to determine the impact of your action?*
- *How will we collect and assess the data that we want to monitor, how will we use the data, and how will we communicate the results?*
- *How do we expect the action to fill the priority factor or gap? What do you expect to happen when the action is completed?*