



# Strategy Review System

Revisions to the SRS Process for the 4<sup>th</sup> Cycle

October 18, 2023



**Chesapeake Bay Program**

*40 years of science, restoration and partnership*

# ADAPTIVE MANAGEMENT AT THE BAY PROGRAM



2 0 1 4  
As amended, January 24, 2020

"...adaptively manage at all levels of the Partnership to foster continuous improvement."

## The Strategy Review System (SRS):

- Provides a structured, consistent process that applies adaptive management to our work.
- Acts as an accountability loop between the Management Board (MB) and the Goal Implementation Teams (GITs).



# REVISING THE SRS PROCESS

- **Aim:** Improve the experience of those interacting with the SRS process while maintaining the integrity of our adaptive management system.
- Respond meaningfully to input:
  - Revisited recommendations & ideas of MB (2022 presentation by C. Bisland).
  - Considered themes from the Biennial Report & "Lessons Learned" doc.
  - Engaged Coordinators and Staffers in the co-development of improvements.

This learning and adaptation is consistent with the adaptive management framework that guides us, in that we have an opportunity and obligation to highlight learnings and adjust our approach.

# SRS 4<sup>TH</sup> CYCLE CO-DEVELOPMENT

## WORK SESSIONS ON JULY 13, JULY 26, AND AUGUST 16

- Calendar of Cohorts:
  - Where do commonalities exist among outcome themes?
- Lighten the Load
  - How do we stay true principles of adaptive management in a way that is less burdensome?
- Sequence of Science
  - How do we improve upon when we engage STAC & STAR in the SRS?



# STREAMLINED PROCESS & DOCUMENTATION

## Revision

- **Decreased the number of required steps** from 14 to 8
  - 3 additional steps are optional
- Consolidated elements of past templates into **a single "Outcome Review Summary" document**
  - Outcome Attainability
  - Logic & Action Plan
  - Narrative Analysis
  - PowerPoint
- No required PowerPoint Template
- No required Workplan Template

## Benefits

- Streamlines SRS Process
  - **Less burdensome** for MB members and Outcome Leads
- **Eliminates redundancy** in documentation
- Provides **greater flexibility** to prioritize successes or challenges brought to MB.
- Only one document required for submission to the MB.

# QUARTERLY PROGRESS MEETINGS

- All outcomes will go through the full SRS Process once every two years
- All outcomes have the option to come before the MB every year
- Aim for 5-6 hour, in-person meeting
- Where possible, prioritize discussion of off track outcomes in the first year of the 4<sup>th</sup> cycle



# Calendar of Cohorts: Annual/Biennial Schedule with 4 Cohorts

- Outlook Uncertain
- Outlook Off Track

2023	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
					Biennial Meeting			4 <sup>th</sup> Cycle Starts			Living Resources <ul style="list-style-type: none"><li>• SAV</li><li>• Wetlands</li><li>• Brook Trout</li><li>• Black Duck</li><li>• Oysters</li><li>• Bl. Crab Abundance</li><li>• Fish Passage</li><li>• Fish Habitat</li><li>• Forage Fish</li></ul>	
2024	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
		People <ul style="list-style-type: none"><li>• Stewardship</li><li>• Diversity</li><li>• Stud. Env. Lit.</li><li>• Env. Lit. Planning</li><li>• Sust. Schools</li><li>• Public Access</li><li>• Local Leadership</li></ul>			Watersheds <ul style="list-style-type: none"><li>• Healthy Watersheds</li><li>• Tree Canopy</li><li>• Forest Buffers</li><li>• Climate Adaptn</li><li>• Climate Mntr</li><li>• Stream Health</li><li>• Protected Lands</li><li>• Land Use Meth./Metr. &amp; Opt. Eval.</li></ul>			Clean Water <ul style="list-style-type: none"><li>• Toxics Policy /Prevention</li><li>• Toxics Research</li><li>• 2025 WIPs</li><li>• WQ Stnds Attain/Mon.</li></ul>			Living Resources <ul style="list-style-type: none"><li>• SAV</li><li>• Wetlands</li><li>• Brook Trout</li><li>• Black Duck</li><li>• Oysters</li><li>• Bl. Crab Abundance</li><li>• Fish Passage</li><li>• Fish Habitat</li><li>• Forage Fish</li></ul>	
2025	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
		People <ul style="list-style-type: none"><li>• Stewardship</li><li>• Diversity</li><li>• Stud. Env. Lit.</li><li>• Env. Lit. Planning</li><li>• Sust. Schools</li><li>• Public Access</li><li>• Local Leadership</li></ul>			Watersheds <ul style="list-style-type: none"><li>• Healthy Watersheds</li><li>• Tree Canopy</li><li>• Forest Buffers</li><li>• Climate Adaptn</li><li>• Climate Mntr</li><li>• Stream Health</li><li>• Protected Lands</li><li>• Land Use Meth./Metr. &amp; Opt. Eval.</li></ul>			Clean Water <ul style="list-style-type: none"><li>• Toxics Policy /Prevention</li><li>• Toxics Research</li><li>• 2025 WIPs</li><li>• WQ Stnds Attain/Mon.</li></ul>			Biennial Meeting 5 <sup>th</sup> Cycle Starts Living Resources <ul style="list-style-type: none"><li>• SAV</li><li>• Wetlands</li><li>• Brook Trout</li><li>• Black Duck</li><li>• Oysters</li><li>• Bl. Crab Abundance</li><li>• Fish Passage</li><li>• Fish Habitat</li><li>• Forage Fish</li></ul>	
2026	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
		People <ul style="list-style-type: none"><li>• Stewardship</li><li>• Diversity</li><li>• Stud. Env. Lit.</li><li>• Env. Lit. Planning</li><li>• Sust. Schools</li><li>• Public Access</li><li>• Local Leadership</li></ul>			Watersheds <ul style="list-style-type: none"><li>• Healthy Watersheds</li><li>• Tree Canopy</li><li>• Forest Buffers</li><li>• Climate Adaptn</li><li>• Climate Mntr</li><li>• Stream Health</li><li>• Protected Lands</li><li>• Land Use Meth./Metr. &amp; Opt. Eval.</li></ul>			Clean Water <ul style="list-style-type: none"><li>• Toxics Policy /Prevention</li><li>• Toxics Research</li><li>• 2025 WIPs</li><li>• WQ Stnds Attain/Mon.</li></ul>				

# PROPOSED 4<sup>TH</sup> CYCLE SRS PROCESS

Revised 9/18/23





# SRS PROCESS: REMINDER

- All outcomes will go through the full SRS Process once every two years, regardless of on or off-track status.
  - Required steps:
    - 5a: Complete & send Outcome Summary Review to MB 2 weeks before QPM.
    - 6: Quarterly Progress Meeting presentation/discussion with MB.
    - 8: Revise and post Management Strategy & Workplan.
    - Note: As needed, follow-up with the MB is required (step 7).
  - All other steps strongly recommended or optional.

# THANK YOU!

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