





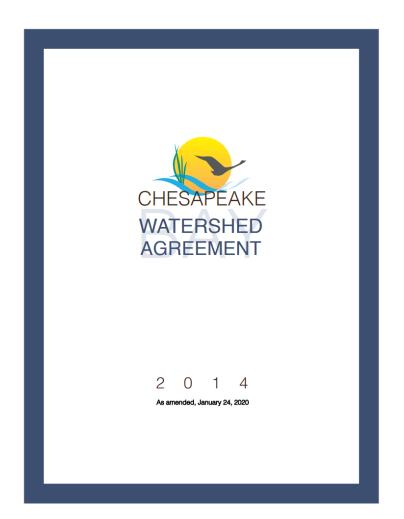


Strategy Review System

Revisions to the SRS Process for the 4th Cycle



ADAPTIVE MANAGEMENT AT THE BAY PROGRAM



"...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 quides us, in that we have an opportunity and obligation to highlight Tearnings and adjust our approach.



SRS 4TH 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

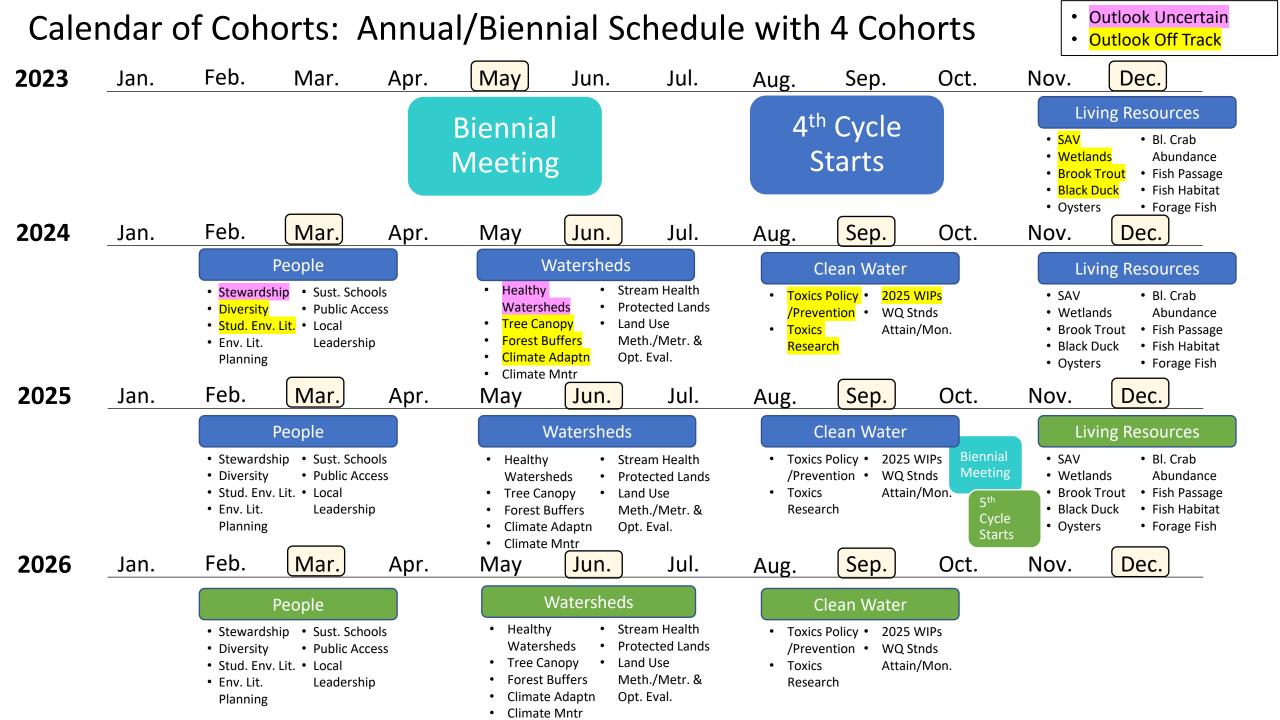
- Decreased the number of required steps from 14 to 8
 - 3 additional steps are optional
- Consolidated elements of past templates into a single "Outcome Review Summary" document
 - Outcome Attainability
 - Logic & Action Plan
 - Narrative Analysis
 - PowerPoint
- No required PowerPoint Template
- No 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
- \bullet Where possible, prioritize discussion of off track outcomes in the first year of the 4^{th} cycle



PROPOSED 4TH CYCLE SRS PROCESS

Revised 9/18/23

COHORT NOTIFICATION

Cohorts notified 180 & 90 days prior to QPM.
Cohorts notify SRS Team of QPM plans: Pass, brief update, full QPM 180 & 90 days before QPM

PREPARE CHECK-IN
MATERIALS

Review MS, complete R/Y/G activity on LAP, & answer "Looking Back" questions.

3 months before QPM

3 MEET STAC & STAR

Logic analysis w. STAC Science Needs w. STAR Draft Outcome Review Summary

Abt. 8 weeks before QPM

Op

SRS CHECK-IN MEETING

Optional opportunity to meet with SRS Team to discuss process

7 weeks before QPM

C/S DRY RUN W

Practice presentation.
Opportunity for crosscohort collaboration

3 weeks before QPM

QPM MATERIALS DUE

2 weeks before QPM

Complete & send Outcome Review Summary to MB.

Send optional PowerPoint presentation to MB.

QUARTERLY PROGRESS MEETING

MB Meeting: Outcome attainability & problem-solving presentation/discussion. Emphasize off-track outcomes in 2024

Op QPM FOLLOW-UP

As needed, follow-up actions and decisions are distributed for outcome lead review

3 days after QPM

7 MB FOLLOW-UP

As needed, follow-up with the MB for a discussion on actions & decisions

2-4 weeks after QPM

Op MEET SET

Optional opportunity for Outcome Lead to meet with the Strategic Engagement Team.

after QPM

REVISE & POST
MS & WORKPLAN

Revise and post Management Strategy & Workplan. No formal submission to public or MB

12 weeks after QPM

Step required every 2 years

As needed, step required

Step strongly recommended

Optional Step

SRS PROCESS: REMINDER

- All outcomes will go through the full SRS Process <u>once every</u> 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!

Sarah Brzezinski

Strategy Review System Coordinator
US EPA Chesapeake Bay Program Office

Brzezinski.Sarah@EPA.gov

