Chesapeake Bay Program
2023 Strategy Review System (SRS) Biennial Meeting

Charlottesville, VA
May 11-12, 2023

Report in Brief

The 2023 SRS Biennial Meeting convened the Chesapeake Bay Program partnership to fully integrate learnings into the charting of a course to 2025 and beyond 2025 for all outcomes so that the response to the Executive Council (EC) charge is representative of the full spectrum partnership. The following objectives were established to reflect desired outcomes from the collaborative discussions:

1. **Science**: Determine opportunities to leverage action for existing science challenges and identify emerging issues.
2. **Restoration**: Address outcome attainability (and non-attainment) by identifying priorities and formulating strategies to address critical knowledge gaps and develop a communication strategy for communicating progress and challenges.
3. **Partnership**: Assess our partnership for where we have gaps and how we can ensure a diverse and robust partnership moving forward.

This two-day, hybrid event gathered about 100 participants in Charlottesville, VA and virtually. The Biennial Meeting included a "gallery walk" to showcase 25 posters and their authors about outcome successes across the partnership, financial resources, targeting tools, and other informative projects. The meeting also used the World Café technique to host large group collaborative dialogue among all participants around key questions in the Chesapeake Bay partnership.

This report in brief presents repeated themes, ideas, and recommendations collected from the Biennial Meeting, organized in reverse order of the objectives: partnership, restoration, and science.

1. PARTNERSHIP

1.1 Value of the Partnership and Opportunities for Improvement

Meeting participants agree that the partnership is valuable. As we work to restore, protect, and improve the Bay watershed, the partnership provides essential accountability, consistency, and stability. Partners recognize that the program is built on trust, expertise, and dedication, which support progress towards achieving goals. We have a strong sense of the value of our work, which stands on principles of scientific integrity and excellence.

Though the partnership has many strengths, there is a need to better define our partnership so that we do not try to be all things to everyone. This theme is reiterated in comments related to improving outreach and engagement and developing a communications strategy (Section 1.4 and Section 1.5, respectively). Learning and adapting are cornerstones of our program driven by science-based policy. Some participants noted that we should have the courage to learn from mistakes, make changes if things don't work, and follow the best science to become better watershed stewards. This adaptive frame of mind can be applied across the program, from outcome attainability to the governance and structures of the partnership.

As we hear calls for accelerating progress, we need to acknowledge our intense internal schedules and the limited resources available. It would be beneficial for the partnership to assess how the CBP conducts business, inviting new approaches into our work that results in greater balance across

investments, addressing diverse outcomes while better managing expectations. Fostering innovation may be achieved by reducing constraints on new ideas through sandboxing, by addressing capacity challenges, and through the thoughtful assessment of trade-offs. Some meeting participants called for more transparency on funding decisions with opportunities to provide input on targeting resources.

In addition, strong leadership that can participate in meaningful efforts to prioritize and establish balance across diverse outcomes and workloads can help guide the partnership. CBP would also benefit from full-time jurisdictional representatives and a clear team that can represent their state.

1.2 Opportunities to Break-Down Boundaries & Increase Collaboration

CBP has a compelling organizational framework, but the decision-making process is criticized by some for being too hierarchical and bureaucratic, and for not being collaborative or efficient enough. There is room for improvement, to include broadening perspectives and increasing representation, breaking down silos, and improving consensus building and collaboration.

As a network of networks, the partnership can go beyond the workgroups to include grassroot organizations, NGOs, local governments, and communities, enabling the partnership to be more inclusive and have a deeper reach locally. Expanding the diversity of groups represented within the partnership has the potential to represent a wider variety of ideas and opinions in support of partnership goals.

The partnership would benefit from better internal communication and collaboration; we have siloed groups that are moving in different directions. Structuring decision-making, to include implementers and beneficiaries of our plan, would allow for more effective and collaborative balancing at the partnership scale. Additionally, working to remove “inside” “outside” perspectives that give the impression of EPA versus everyone else, and being more open minded, creative and solution driven are opportunities for improvement.

More cross-pollination could increase awareness of what other groups are doing within the partnership. Expanding the cross-collaboration between workgroups and GITs may help the partnership become nimbler at solving problems. However, there is no incentive, per the Agreement, for cross-collaboration between workgroups and GITs.

Biennial participants recognized the strengths of Advisory Committees; some noted the need to have more authentic engagement with them to recognize and leverage their expertise, more carefully consider their recommendations, align our work when appropriate, and integrate them into the feedback/learning loops. Educating partners about the value and contributions of the Advisory Committees could help the partnership.

1.3 Leveraging Existing Networks for Increased External Engagement

Connecting our partnership to existing networks and organizations, and moving information in both directions, has the potential to create beneficial feedback loops that inform our work. Various participants noted that our effectiveness in achieving our objective would be improved if our networks were expanded to include the following: larger corporations, the agriculture industry, conservation districts, the urban sector, Choose Clean Water Coalition, as well as watershed organizations, community organizers and advocates, and volunteer groups. Digging into the state and regional level with NGOs who can work with the locals will improve visibility and help with relaying messaging.

There was acknowledgement of the role of local watershed groups and continuing to work with them as a resource and potential local delivery mechanism for action toward outcomes and goals.

Capacity building of these groups may be needed, as well as networks linking them together to work within a local watershed. Investments in having community organizers and working with watershed organizations and conservation districts may fill essential gaps to make us more effective.

1.4 Improving Outreach & Engagement

Section 1.1 notes that we need to better define our partnership so that we do not try to be all things to everyone; the same is true of the partnership's outreach and communications efforts. At the Biennial meeting, we heard conflicting opinions about who the partnership should be communicating to and what we should be talking about, as well as who we should be engaging with and what we should be collaborating on. As an example of this contradictory feedback, an attendee noted that our current outreach to stakeholders is not broad enough, while another noted that our efforts are not targeted enough.

Some meeting participants see it as our job to connect regularly with the public and local communities in meaningful ways; others see the partnership as a network of networks and place priority on engaging stakeholders and partners who, in turn, engage with the public and local communities. Other attendees appear to see a middle ground, believing that the partnership should prioritize engagement of stakeholders and partners, then work with them to utilize their networks to further local and public engagement on key topics. The following paragraphs summarize Biennial participant views on essential components of public and stakeholder engagement, then conclude with broader partnership considerations.

Some meeting participants feel that our work would be more effective if we were able to connect with the public early in the process of defining our goals and intended outcomes, and regularly reconnecting as we work to achieve them. However, we often lack the space and time for public input as we run up against internal deadlines, making it challenging for adequate engagement and participatory decision making. Meaningful public engagement would require us to modify our approach and be open to structures beyond our existing framework to ensure we don't just keep talking to ourselves.

Participants in favor of this form of public engagement note that it should include the co-development of actions, plans, and agreements, as well as implementation. This form of public engagement would require going to the communities and encouraging them to discuss their interests. Some feel that we would need to talk about local waters and impacts, rather than just the Bay. The Bay can be overwhelming, but your own creek could be more manageable. Some meeting participants suggest that we should have a customer service mentality and seek to understand the public's values and motivations to create programs and opportunities that are aligned.

Biennial participants who support increased public engagement note that marginalized communities are not uniform; they have different demographics, cultures, and priorities, and require engagement strategies that are location dependent. The partnership needs to meet people where they are and expand outreach to non-traditional stakeholders, especially underserved communities. Our work and progress should be conveyed in plain language and look at ways to increase accessibility. Showing the spatial relationship between neighborhoods, funding, jobs, and the impacts of projects would enhance such outreach.

Some key questions for further consideration in relation to public engagement include: where do we make decisions on when to engage directly with the public; is there a disconnect with what we are doing and what they want; how do we align goals and outcomes with their needs; and do we have, or can we develop, tools and resources to address those needs? We should be honest in what we think we can address, and not set up false expectations.

There needs to be a clear definition of "the public" and "stakeholder," and an engagement strategy that utilizes our network of networks to connect to more groups. Collaborative work moves at the speed of trust. To make engagement more inclusive and equitable, time and the collaboration with trusted sources are needed to build relationships and trust.

Stakeholder engagement and public engagement costs money and requires time. Some meeting participants called for increased funding to support these activities. Other participants noted that providing support for travel and meals can help stakeholders participate in meetings and reduce barriers to diverse, equitable representation and reflect their priorities in our work. Identifying a consistent source of support that enables additional representation in our work would be beneficial to the partnership.

The partnership would benefit from identifying and prioritizing external audiences for strategic engagement. By seeking to understand the values and motivations of targeted audiences, the partnership could engage in more meaningful, mutually beneficial interactions, then build capacity and leverage existing networks to meaningfully engage with them in ways that utilize best practices. Communicating who our priority audiences are for targeting, as well as how and why they were selected, and how they will be engaged, would increase transparency within the partnership and could result in more effective engagement.

1.5 Developing a Communications Strategy

Partnership communication efforts would benefit from a strategy that incorporates better branding and a common script of the CBP, with messaging on who we are and how our work connects to the values of communities. As we think about developing and implementing a strategy, we need to first look internally at our partnership to determine who we are currently speaking to and who we want to be speaking to as well as what and how we communicate. Further, there is a lot of confusion about what all the Bay organizations do (i.e., Chesapeake Bay Foundation, Chesapeake Conservation Partnership, Chesapeake Bay Program, EPA Chesapeake Bay Program Office). Though each partner has its distinct brand and accomplishments, developing a shared knowledge about who we are, what we do, and why our work is important will help members of the partnership speak with one, unified voice. Our message should be tailored to the recipient. Recognizing stakeholders are important to accomplishing our goals also acknowledges their potential to amplify our message and make key messages relevant to local audiences.

Some Biennial participants feel that making everything about the Bay limits connections to stakeholders, noting that there is more to the Bay than just water quality. These people recommend that we flip the narrative in our favor and communicate how our outcomes are relevant to locals.

Recognizing the importance of strategic communications, Biennial participants noted that more funding and resources could improve both communication to and engagement of our stakeholders. Some participants noted the need for more trained communicators, trusted sources, developers, social scientists, and community organizers. Several participants also noted that having social scientists help craft the partnership's communication strategies could help us better understand how to achieve behavior changes that will lead to more action locally and across the bay.

1.6 Improving Management Board Structure

Some participants at the Biennial felt that the Management Board needs to be more effective and responsive. Although members are supposed to speak for the Bay, some Biennial participants felt that members represent just their agency or jurisdiction. These Biennial participants recommend that Management Board representation for each jurisdiction should be multidimensional to ensure they represent many of the outcomes, not just those related to water quality. Further, jurisdictional

representatives need to talk to others in their state, not just within their own agency.

Similarly, some participants noted that the partnership should consider a different structure for the Management Board that includes more representative leadership voices, better reflects the demographics of the watershed, and provides a larger voice to the public and nonprofit organizations. Additional considerations put forth by Biennial participants include the potential to expand the communications staff so that they can simply package messages for the Principals' Staff Committee/Management Board for full context decision-making and utilizing STAC to translate the science into talking points and recommendations.

2. RESTORATION

2.1 Refinements to the Watershed Agreement

The Watershed Agreement (Agreement) is comprehensive. It provides a shared vision to focus action, establishes a set of shared commitments and priorities, and connects partners with diverse expertise. The Watershed Agreement also establishes a framework for accountability, consistency, and structure that has been used to identify science needs and GIT funding for science support.

Because there are pros and cons to making changes or refinements to the Agreement, we should be deliberate and collaborative, understanding the many potential unintended consequences. We should be very strategic about the degree of revision.

The CESR report notes that "the Bay of the future will never be the Bay of the past." It is important to understand how we got to where we are today and how much the landscape has changed in the 400 years since colonization, but equally important to realize that today's priorities may be different. Recognizing that the Bay is changing, for better or worse, some meeting participants felt that we need to allow for outcome target shifts to reflect rising populations, temperatures, and waters, with associated changes in land use and habitat, meaning we need to shift from very fixed targets to using "response functions" as targets with envelopes of uncertainty (probability-based management).

The partnership, some felt, should seek to find common ground on reasonable and achievable goals that protect all resources, living and otherwise, while pursuing practical approaches to indicators and outcomes that account for a holistic view, that focus on what is realistic to accomplish, and that are more specific, measurable, achievable, realistic, and time-bound (i.e., SMART goals). Assessing the partnership's return on investment, as well as the equity and environmental justice associated with meeting the goals and outcomes, could help identify priorities and establish trade-offs.

Additional considerations related to crafting refinements to the Agreement, as noted by some Biennial meeting participants, include:

- Identifying outcomes that incentivize behaviors that will improve watershed health. Some feel that our current outcomes can disincentivize beneficial behaviors, or potentially even encourage behaviors that result in unintended, negative outcomes at the local level, such as degrading habitats or reducing diversity in streams.
- Focusing on the watershed instead of just the Bay. When we only focus on the Bay in our agreements, some meeting participants worry that we leave out many stakeholders and resources.
- Considering our word choice carefully. Some Biennial attendees noted that we need to get rid of the words "restore" and "restoration", which they feel set us up for failure, as we won't get the

old Bay back. The words “recovery” and “improvement” were suggested by these meeting participants as much better term than restoration.

2.2 Determining and Achieving Outcome Attainability

We may not have reached our destination and the pace of progress is slower, but Biennial participants agree that we are not failing. Targets, milestones, and deadlines are important for the pace of the journey, but the journey itself is important, too. Determining outcome attainability is challenging, in some instances, due to undefined targets, a disconnect between outcomes and monitoring, and a lack of capacity to fill research gaps. By applying our learning from outcomes that are on track to those that need additional progress, and by refining outcome language, we communicate progress as we approach 2025. The partnership should apply learnings about outcome attainability as we consider refinements beyond 2025 as part of our adaptive framework.

2.3 Qualitative Versus Quantitative Outcomes

We need to address uncertainty among indicators and qualitative outcomes. Most of the quantitative outcomes have indicators, monitoring support, and associated management actions that generate measurable, reportable results to judge progress. Quantitative versus qualitative data and areas of overlap for the outcomes should be assessed, including whether it is necessary to have clear numeric metrics and if we need full accounting or a sense of progress. Further, do we have aspirational goals or practical achievable goals, and if so, is it better to evaluate them qualitatively?

2.4 Focusing on People and Communities in Our Outcomes

Placing people at the center of our work was a theme heard multiple times at the Biennial. We have recognized DEIJ and climate outcomes, but they are currently somewhat siloed. Some felt that our goals and outcomes should be relevant to local communities and include impacts to people, with our work aligning to meet their needs. They noted that a revised Agreement should reflect people and healthy communities, and felt that the same weight should be given to people as is given to the environment. Further, some Biennial attendees note that revised goals and outcomes should be written and communicated in plain language to reflect and align with what the people care about.

We should also think about the fairness of benefits to individuals versus the benefits to the greater good. Questions for further consideration include: how do we implement incentives equitably with increased payments when considering community affordability versus the benefit to the landowner/customer; and is it fair, equitable and just to pay or build more incentives into targeting strategic areas when property owners in non-target areas are implementing the same practices? Water quality is a primary desire and concern of communities, not just a component of our program. Stakeholder groups understand clean water but have concerns beyond nitrogen, phosphorus, and sediment. Some Biennial attendees believe that a prioritized group of toxic contaminants should also be considered in a revised Agreement, as well as alternatives to BMP counting (i.e., manage to ecological outcomes not the number of BMPs put in place).

2.5 Connecting the Outcomes to Be More Effective

Some Biennial participants believe that outcomes should be reduced or restructured, be clarified, have less ambiguity, be measurable, and have more aggressive targets and implementation. With a refined Agreement, the partnership would have an opportunity to reconfigure how outcomes are written to reduce silos.

In the current agreement, goals are broad enough to be easily connected, but outcomes have

created silos. Trade-offs and net benefits should be considered across all outcomes early in the process to emphasize and account for the interconnectedness of outcomes in management, funding, and policy decisions. This will lead to more effective administration, restoration, protection, and stewardship, while helping communicate the complexity, uncertainty and multiple factors impacting efforts, which ensures better accountability.

An example put forth by one participant is to synthesize an outcome for shoreline integrity. As a keystone, cross-cutting habitat challenge, shoreline integrity forms the nexus of management needs associated with multiple outcomes. Some meeting participants feel that we should also have human health outcomes, such as swimmability, fishability, and bacteria management targets. Others note that we should connect water quality to living resources.

2.6 Creating a Process for Assessing Trade-Offs & Establishing Priorities

If a refined Watershed Agreement is developed, the partnership should discuss and establish a process for prioritizing or balancing resources across diverse outcomes. Putting resources towards one action inherently results in trade-offs. Managers may find it easier to make decisions on where to put resources if we could assign value, prioritize our goals, and establish trade-offs. Some meeting participants felt that it is also important to prioritize outcomes based on new data and climate impacts, while others suggest prioritizing them based on which impact people the most.

We can assess whether a priority should be reassigned as we work with our adaptive management and structured decision-making processes to set priorities amongst competing interests. Through this same process of adaptive management, the partnership should assess and reassess if some outcomes require greater levels of attention or resources than others.

Not all priorities are shared among partners or stakeholders, but there will often be some that overlap. For those that are not widely shared, some at the Biennial felt that we should have the flexibility to drop outcomes or transition them to outside organizations that can be more effective champions.

2.7 Modifying our Focus on Water Quality and TMDL

At the Biennial, some felt that the Bay Program should look beyond the TMDL and consider removing it from the CBP daily management. The Bay-wide TMDL changed the perception of the CBP as more of an enforcer of the TMDL than a partner in proactive conservation. The reality going forward may be that it is a bit of both and that we need to emphasize the proactive and flexible nature of the partnership with the backstop of the TMDL.

Some felt that the regulatory nature of the TMDL takes attention and resources away from other topics. There are other factors that influence living resources besides nutrient and sediment pollution. Some suggest refining water quality outcomes outside of TMDL to be more specific so that measurement of progress is more practical, and broader than just nitrogen, phosphorus, and sediment. Temperature, for example, was suggested as a factor that could be added as a water quality standard attainment element in the TMDL. Also, by focusing on water quality management actions that create or conserve habitat or conserve land, we can incentivize more trees, riparian forest buffers, and protect shorelines.

2.8 Opportunities to Improve the Strategy Review System

There are opportunities to leverage, expand, improve, adapt, and simplify the Strategy Review System (SRS), but it may require programmatic change. Some who participate in the process feel like they are spinning their wheels and work is unnoticed. Despite a two-year SRS cycle, some participants reported that they feel that the proportion of time their team spends planning for and

participating in the SRS process is imbalanced with time available for broader implementation. A potential solution to this challenge is to empower the GITs and workgroups to review and suggest improvements to SRS products, such as the Logic and Action Plan. Some participants felt that it would also be important to reassess the structure and membership of the Management Board to ensure they are able to respond to requests, while others considered the idea of pushing some of the SRS process to the GIT level, with larger issues being raised to the Management Board.

Expanding adaptive decision making by improving the transfer of learnings to relevant decision makers, expanding the scope of adaptive management, and improving the capacity to identify and evaluate uncertainties and gaps in the system responses can improve our ability to learn.

3. SCIENCE

3.1 Applying Tools and Technology

The Bay Program has created many technology-driven tools. Some at the Biennial suggested shifting our mindset from creating more tools and data, to focusing on how we distribute and communicate them. Current tools are hard to use or require expertise. Finding a way to direct potential users to the tools and ensuring that they are both accessible and easy to use by diverse stakeholders across the watershed, would be especially useful for local decisionmakers and practitioners. Biennial attendees also noted that we should design tools to meet local priorities rather than designing tools and launching them into space.

The application of these tools should be focused on how they lead to action and decision-making processes, such as benefit analyses and making comparisons across different resources to result in a more holistic picture. Some Biennial attendees recognized that we may not have been as effective as we thought with certain outcomes, but there are new tools and technologies we can apply to redirect the program.

3.2 Increasing Social Science in Our Work

There are many reasons some meeting participants want us to invest in social sciences. Better understanding of human behavior can identify key interventions that lead to behavior change and acting in support of Watershed Agreement goals. It should also be acknowledged that social science is more than just behavior change. Not only will it help us to understand audience needs, but it will help us communicate to the local level more effectively.

Embedding social science into our programs and having social scientists synthesize the partnership's rich data may help define more impactful programs, adjust our incentives, and connect members of the partnership across our goals. The CESR and Rising Water Temps reports, in addition to other key lessons learned, outline first steps to utilize social science tools to engage and serve communities centered on their needs and matching our outcomes.

3.3 Increased Monitoring and Resources

Some meeting participants believe that more monitoring, and additional resources are needed for all goals and outcomes. Through engagement, we can encourage more community science to expand the scope of community monitoring and improve the use of the gathered information.

An increased focus on explaining what our monitoring data tells us could help the partnership connect with stakeholders. Some felt that more resources should be allocated to communications, injecting social science into monitoring efforts, and engage with people to understand what is important to them so that our monitoring efforts reflect those priorities. Further, some participants

felt that we need to understand the impacts of rising temperatures for monitoring.

3.4 Considering Climate Change Impacts in Our Work

The "vision" for a restored Chesapeake Bay should account for the effects of climate change. Our work needs to consider climate change impacts to restoration and build in resiliency under climate change scenarios. Science and information are needed to understand how climate affects this vision (what will the Bay be like in a warmer climate?) and how we manage for restoration.

Communication, education, and information are needed to address barriers to climate-adapted policy and implementation. The CESR report makes climate change recommendations that we need to consider based on accepted science and that are consistent with our shared vision/mission.

Adjusting for climate change in our work means changing our systems of implementation, evaluation, and accountability to reflect uncertainty and the effects of multiple stressors or changing conditions. For example, we should incorporate climate-adapted science, which is science that is done within the framework of a different climate. We'll also need to provide science background to support changing systems and living resources populations.

Further, some participants noted a need to re-evaluate the basis of water quality criteria accounting for temperature effects that change the range of habitat conditions and synthesize threshold science on shoreline integrity for diverse resources. We can establish shoreline integrity targets for the Bay knowing development is intersecting with sea level rise and many outcomes are affected by shoreline hardening (i.e., SAV, fish, crabs, water clarity, black duck, wetlands). While most effective basins (MEB) are focused on the deep trench, we are missing the focus on the shallow waters, especially given climate change impacts we are witnessing today.

Also, having common climate messaging and normalizing it in communication will make it easier for people to talk about it and act. For example, members of the partnership could use the phrase "temperature is rising" not "climate change" and use climate change synonyms like "resilience." Some Biennial attendees felt that our language should center climate for educational purposes (e.g., climate hurricanes, climate flooding). We also can utilize translators to put benefits of practices in community terms. By normalizing climate change in communication, we will make it easier for people to talk about without political implications.

3.5 Focusing on Living Resource Response

At the Biennial, some attendees noted that we need to define what is meant by living resource response (i.e., sub-cellular, cell, organ, individual species, population community). We can improve how we incorporate and "maximizing impact" of living resources into our work, to include:

- simplifying messaging of living resources through direct outreach and engagement to the local level, beyond CBP members;
- using high resolution land use for living resource modeling and habitat status and trends;
- building/expanding community science for living resource tracking;
- incorporating artificial intelligence and machine learning for living resource applications;
- creating an integrated metric for living resource response;
- utilizing living resource sensitivity profiles to diverse stressors in order to understand which factor(s) can be targeted for the greatest response to investment;
- designing the TMDL for living resource response as a "silo-busting" approach;
- modifying MEB to include living resource responses; and
- adding temperature, which affects living resources, as a water quality standard attainment element in the TMDL.