**NOTE:** Delete all notes in this blue color prior to finalizing your Outcome Review Summary. These comments are intended to help you draft your Outcome Review Summary.

**NOTE:** The Outcome Review Summary document will help you prepare for your Quarterly Progress Meeting (QPM) and will provide the Management Board with the information they need to discuss progress toward your outcome. Finalized responses to all questions in this document will be submitted to the Management Board at least two weeks prior to your QPM (**Step 5** of the Strategy Review System process). You may use this document for your Dry Run in **Step 4** and in your optional presentation to the MB in **Steps 5b and 6**.

[Outcome Name]

[Month Year] Quarterly Progress Meeting

# LOOKING BACK: LEARNING FROM THE LAST TWO YEARS

**NOTE:** Answer the following questions three months before your QPM.

**NOTE:** Materials needed include your Current Logic & Action Plan/Work Plan

**NOTE**: 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. It is recommended that you provide your responses to the Looking Back questions and the G/Y/R activity to STAC/STAR representatives prior to your meeting with them. This background material will inform the conversations that take place in STEP 3 (strongly recommended).

## 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](https://www.chesapeakeprogress.com/) and the [outcome status page](https://www.chesapeakeprogress.com/outcome-status).

### 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)? Would you characterize this progress as an increase, decrease, no change, or completed? **NOTE**: 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. Consider and reflect on the actions you intended to take during the past cycle. For action that have not begun, or which have encountered a serious barrier, what is preventing us from taking action? Are these actions still needed? **NOTE**: This question is in reference to the actions you marked in “red” in your current Logic & Action Plan or Work Plan. 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?

# ASSESSING OUR EFFORTS AND GAPS

**NOTE:** Materials: Management Strategy, Current Logic & Action Plan with completed Green/Yellow/Read analysis, responses to the Outcome Review Summary questions above, and the questions listed below in the Outcome Review Summary.

**NOTE**: Per **Step 3** [Optional?] of the SRS process, it is strongly recommended that you meet with STAC/STAC approximately eight weeks before your QPM to review and populate as much of the next two sections as possible.

**NOTE:** Review and reflect on 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, environmental, fiscal, or policy-related developments that have already or may influence your work over the next two years. **NOTE**: Please consider the impacts of climate change in your response, as appropriate.

### 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? **NOTE**: 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:

* **S**pecific and actionable need
* **P**rogrammatic partner
* **U**rgency of the needed action
* **R**isk of not acting
* **R**esources 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?