







Strategy Review System

Revisions to the SRS Process in Advance of the 4th Cycle



IN THE NEXT 25 MINUTES...

4th CYCLE

- Proposal
- Revisit
 Recommendations
- Lightening the Load
 - Sequence of Science
- Calendar of Cohorts

DISCUSSION



SRS 4TH CYCLE PROPOSAL

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...writing to ask for your support to adjust the 4th cycle August 2023 starting point. Our goal is to target the November QPM meeting as the revised start date, but we need to evaluate the respective timelines before finalizing that date. While the team does not anticipate large changes for the 4th cycle, we hope to improve the experience of those interacting with the SRS process while maintaining the integrity of the overall adaptive management system.

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REVISITING RECOMMENDATIONS & THEMES

Retrospective on Lessons Learned from the Chesapeake Bay Program Strategy Review System's 3rd Cycle with Suggested Adaptations to Address the Issues

Executive Summary

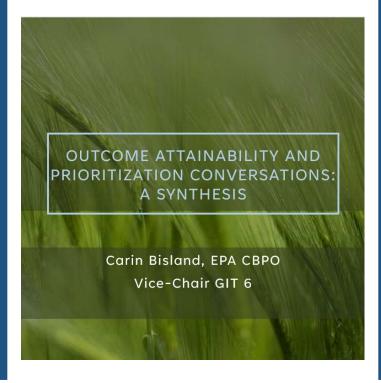
Overview

During the winter 2022-23, the Strategy Review System (SSR) Planning Team conducted a retrospective analysis to extract lessons learned from successes and challenge sin the Chesapeake Bay Program (CBP) partnership's efforts to achieve 2014 Chesapeake Bay Watershed Agreement goals and outcomes. The retrospective was informed through chesapeake Bay Watershed Agreement goals and outcomes. The retrospective was informed through the slope single singl

Ten key lessons were identified by the SRS Planning Team (Table 1). Strategies to improve partnership successes and accelerate progress were recommended with each lesson. An extended discussion explaining the issues involved in the Lessons Learned and addressing Suggestions for Adaptation identified is provided in the Discussion section. Outcome-specific successes and challenges are summarized in Appendix A.

Table 1. 10 Lessons Learned and Adaptations to consider about the Chesapeake Bay Program (CBP) partnership's activities and efforts to address outcome achievement extracted from products of the Strategy Review System (SRS) 3rd cycle, May 2021-May 2023 or 1921 or 192

	<u>Lessons Learned</u>	Adaptations
1.	The Strategy Review System is successfully informing the implementation of the 2014 Agreement goal, but it could use strategic modification for improved return on investment	Strategically modify the current SRS process and living documents for use when planning and implementing activities beyond 2025
2.	Outcomes may be presented in the Agreement as if they are meant to have equal priority for dedicating resources, management activity and achievement. However, experience shows that attention and effort addressing the outcomes is unbalanced	Set an initial strategy for adjusting the present unbalanced distribution of resources affecting outcome achievement to realize more equity in support toward achieving all outcomes; Rebalance emphasis across outcomes more equitably, employ Structured Decision Making to help achieve rebalance and prioritration;
3.	Capacity limitations affect the rate of achievements;	Strengthen workforce; managing expectations should furthe be aligned with available capacity or support changes and investments to enhance capacity; help CBP agencies and partners access new resources to address targeted capacity limitations
4.	Outcomes do not live in silos (e.g., climate, diversity), they are interdependent requiring more cross-outcome interation to achieve success for all outcomes	Utilize systems thinking perspective when considering structure of outcomes beyond 2025



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:

- Science: Determine opportunities to leverage action for existing science challenges and identify emerging issues.
- 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.
- 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 Charlottsexille, VA and virtually. The Biennial Meeting included a "gallary 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 Chespeake 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 recognise that the program is built on trust, expertize, 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 intentity and excellents.

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 severyone. This time is relearated in comments related to improving outreach and engagement and developing a communications strategy (Section 1.4 and Section 1.5, respectively), Learning and dadpring are conventiones of our program driver by science-based policy. Some participants noted that we should have the courage to learn from mittakes, make change; 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 statishability 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 assets how the CBP conducts business, inviting new approaches into our work that results in greater balance across

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SRS 4TH CYCLE – TOPICS FOR CO-DEVELOPMENT WORK SESSIONS ON JULY 13, JULY 26, AND AUGUST 16

- 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?
- Calendar of Cohorts
 - Where do commonalities exist among outcome themes?



LIGHTENING THE LOAD: STREAMLINED PROCESS

Revision

- Decreased the number of required steps from 14 to eight
 - Three additional steps that are optional

Benefits

- Streamlines SRS Process
 - Less burdensome for MB members and Outcome Leads, including Coordinators and Staffers

PROPOSED SRS PROCESS

COHORT NOTIFICATION

Cohorts notified 180 & 90 days prior to QPM

180 days before QPM 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 Complete Outcome Review Summary

Abt. 8 weeks before QPM



SEQUENCE OF SCIENCE

Revision

- Move engagement with STAC & STAR from after QPM to before QPM
- Ask for STAC experts to help:
 - Conduct the adaptive management analysis and highlight the learning, based on the logic model
 - Define and shape science needs prior to the goal team preparing their QPM documents

Benefits

- Better leverage STAC & STAR expertise & promote more meaningful engagement
- Supports more thoughtful reflections in advance of the MB meeting

Next Steps

- Presentation & decision at September STAC meeting
- This will be an iterative process, rolled out during the 4th cycle

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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

DUE: QPM MATERIALS

Provide Outcome Summary Review to MB. PowerPoint presentation optional.

2 weeks before QPM

Op Optional Step

LIGHTENING THE LOAD: STREAMLINED DOCUMENTATION

Revision

- Reviewed and consolidated elements from the following templates into a single "Outcome Summary Review" document
 - Outcome Attainability
 - Logic & Action Plan
 - Narrative Analysis
 - PowerPoint
- No required PowerPoint Template
- No required Workplan Template
- Workplan is not required to be submitted to MB or for Public Review, but must still be completed & posted

Benefits

- Lighten the Load Eliminate redundancy in reviews, documentation and reporting, and avoids collision of timelines when significant reviews are due.
- Emphasis Utilize the outcome attainability analysis and CESR to drive our focus and energy until 2025.
- Gives outcome leads greater flexibility to prioritize successes or challenges they bring to MB.
- Only one document required for submission to the MB.

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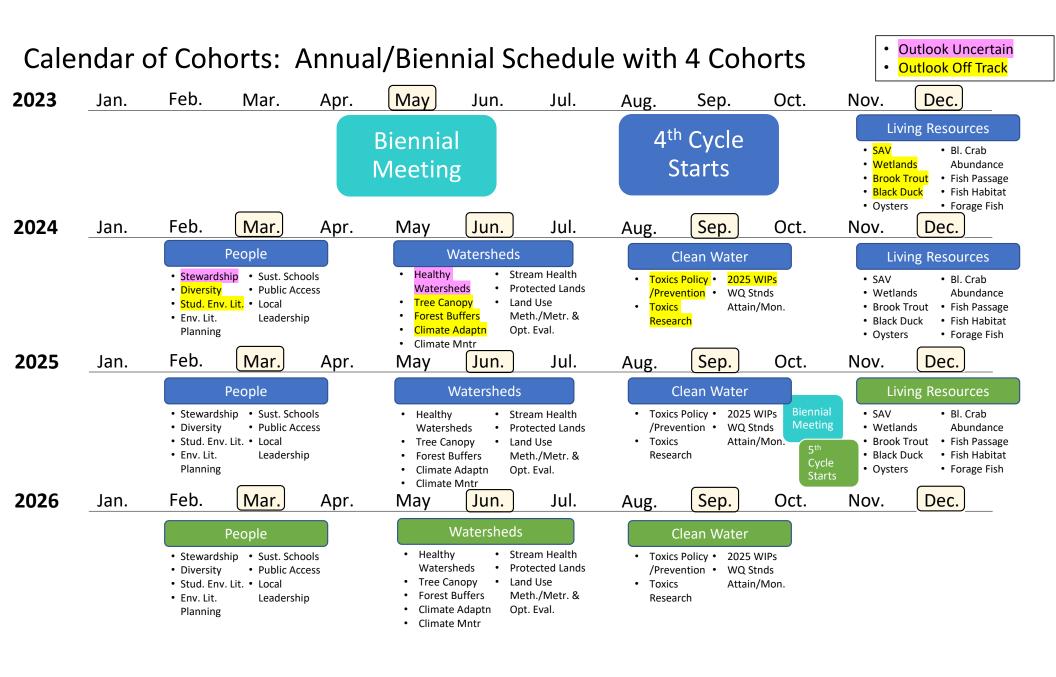
QUARTERLY PROGRESS MEETING

Lightning Talk abt outcome attainability & problem solving. Emphasize off-track outcomes in 2024. On track outcomes may pass

QUARTERLY PROGRESS MEETINGS

- Aim for 5-6 hour, in-person meeting
- All outcomes will go through the full SRS Process once every two years
- \bullet Where possible, prioritize discussion of off track outcomes in the first year of the 4^{th} cycle
 - Off track outcomes that recently completed their QPM may give a brief update instead of repeating the full process in the first year
 - In the first year, on track outcomes may opt for:
 - a "pass"
 - a 10 minute update, with time for clarifying questions from the MB
 - the full SRS process, with time for a 45 minute QPM presentation & discussion





CALENDAR OF COHORTS

Benefits

- Develop stronger thematic alignment among cohorts
- Opportunity for outcomes to be discussed every year, if desired

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7 QPM FOLLOW-UP

Follow-up actions and decisions are distributed for outcome lead review

3 days after QPM

Op MB FOLLOW-UP

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

2-4 weeks after QPM

MEET SET

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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



15

PROPOSED SRS PROCESS – FOR MB MEMBERS

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10

FOR MB MEMBERS, WE BELIEVE THESE CHANGES WILL:

- Reduce the amount of materials that you are required to review for each outcome.
- Present a stronger theme between outcomes in each cohort, increasing opportunities for cross-outcome conversations as we move towards 2025.



THANK YOU!

Jeff Lerner

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