Chesapeake Bay Trust

Tidal Wetlands Strategic Planning Team

United States Environmental Protection Agency

Chesapeake Bay Program
Science. Restoration. Partnership.

Strategic Plan Development using Chesapeake Bay Trust Tidal Wetlands Capacity Grant as a Model

October 2024
Habitat GIT Meeting
Sarah T. Koser, PWS, AAEES, CERP

AGENDA:

- Welcome and Introduction
- Purpose and Goals
- Takeaway Questions
- Thank Funders and center why we are here
- Plan Context [how does plan fit in with other plans/actions]?
- Strategic Plan Process [KEY STEPS]
- Drill Down into gritty details
- Can you see this working for your resources?
- Lessons Learned and Common Themes
- Next Steps
- Open Floor for Discussion

Tidal Wetlands Strategic Planning Team

Purpose and Goals:

Purpose: Share process and methodology of strategic planning for the resource *tidal wetlands* with the understanding that tidal wetlands are a small component of the full suite of resources overseen by members in the Habitat GIT

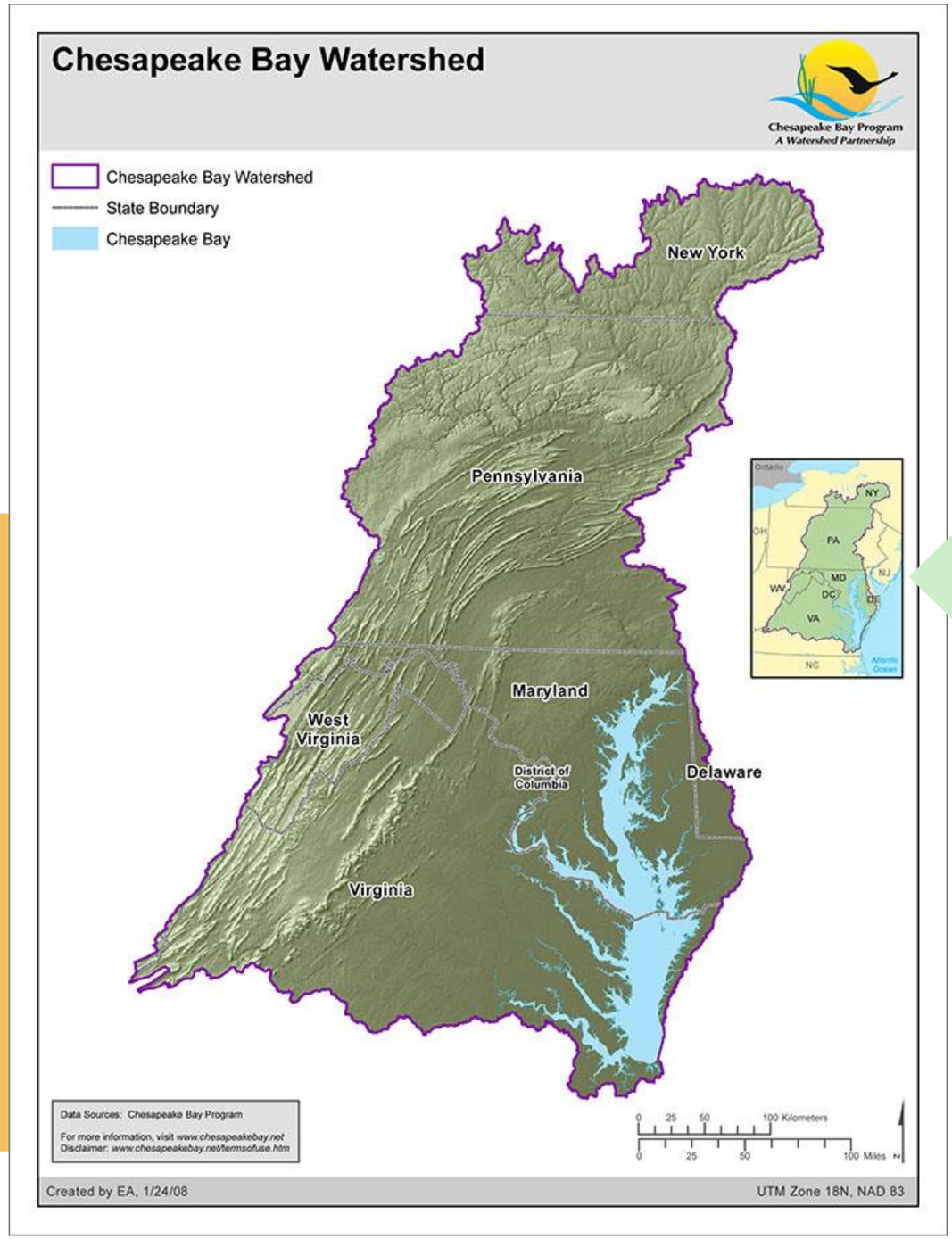
Goals: Provide steps and thoughts that translate into planning ideas **for your resources** as well as share lessons learned to inform audience

Takeaway Questions:

1. Can our process inform a planning strategy for your resources?
2. Can the development of our plan serve as a model for your resources?
3. What has worked for your resource planning?
4. Are the shared lessons learned helpful?
5. How can we improve and collaborate further?

The Chesapeake Bay Trust shares a bold vision for a restored and protected Chesapeake Bay watershed and other natural resources in our area—from the Coastal Bays to the Chesapeake to the Youghiogheny River. We uniquely empower local community-based groups on the ground with the resources they need to take on a meaningful and measurable role in restoring these systems. Healthy natural resources benefit everyone. We know that everyone can make an impact and hundreds of thousands of individuals have come together to improve forests, streams, rivers, bays, wildlife, and more in their own communities.

We are an organization that highly values <u>CONVENING,</u> <u>COLLABORATION,</u> and the <u>TRANSFER/SHARING OF INFORMATION</u>!



The Trust works in the CB watershed, which includes seven jurisdictions.

The CB is 195 miles long and from four to thirty miles wide, with a shallow average depth of ~22 feet.

The Chesapeake Bay and its tidal tributaries have 11,684 miles of shoreline – more than the entire U.S. west coast.

We Make Awards & Apply for Grants

~400 awards per year

~$24 million awarded each year

In 2023, the Trust was designated to receive federal funds from the EPA CBP as part of the EPA Wetland Restoration Capacity Building Grant

WILDLIFE & HABITAT

297,976 native trees, pollinator plants, marsh grasses, and other native plants installed

15 acres of forests, stream buffers, seagrass beds, and wetlands created or restored

63 acres of invasive species removed

Over **4 million** of oysters raised and released

STORMWATER

41 acres of impervious surface treated or removed

47,899 square feet of rain gardens created

126 storm drains stenciled

267 rain barrels installed

58,661 pounds of trash removed, including single-use plastics that choke wildlife and harm our ecosystems' health

EDUCATION & OUTREACH

26,880 students engaged by **1,772** teachers

47,194 people educated through **1,647** workshops

20,493 volunteers engaged, donating **121,447** hours

Thank you to our Funding Partners and …

Chesapeake Bay Program
Science. Restoration. Partnership.

cbtrust.org

…our <u>many</u> Dedicated Collaborators!

Why are we HERE?

Why are we [ACTUALLY] here?

The Watershed Agreement includes numeric VOLUNTARY wetland restoration goals, *but not specifically for tidal / nontidal wetlands*

- Bay Barometer:

WETLANDS

Between 2014 and 2022, 4,310 acres of wetlands were created or restored, while 60,666 acres were enhanced within the Chesapeake Bay watershed. This meets 5.1% of the goal to create or restore 85,000 acres of wetlands, and a 40.4% achievement of the goal to enhance 150,000 acres of wetlands by 2025.

- Chesapeake Progress:

Wetlands

RECENT PROGRESS **INCREASE** | OUTLOOK **OFF COURSE**

Continually increase the capacity of wetlands to provide water quality and habitat benefits throughout the watershed. Create or reestablish 85,000 acres of tidal and non-tidal wetlands and enhance function of an additional 150,000 acres of degraded wetlands by 2025. These activities may occur in any land use (including urban), but primarily occur in agricultural or natural landscapes.

How do we move forward?

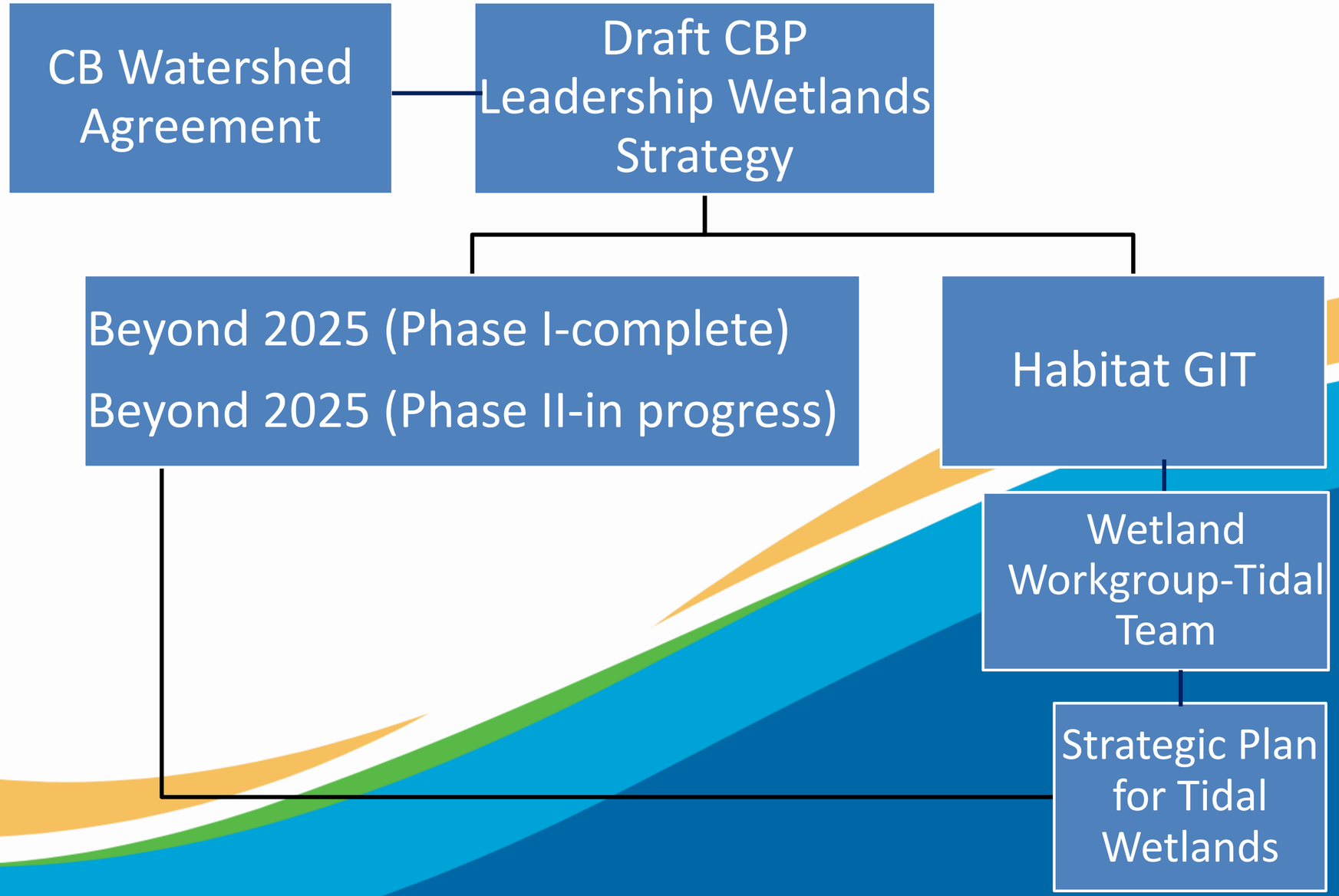
1. Employ a holistic approach to large-scale coastal wetland restoration
2. Develop a single blueprint (Strategic Plan) that outlines how to move forward with the tools and priorities to develop coastal wetland siting criteria
3. Collaborate with the Wetland Workgroup (+ others) as well as the Habitat GIT to develop an approach to implement the blueprint

Our EPA "Work Plan"

Define Context of Strategic Plan

So much exciting progress & concurrent projects…

…how does this all fit together?



Tidal Wetland Strategic Plan Key Steps

- ❑ Write a QAPP and QMP
- ❑ Create a Project Steering Committee
- ❑ Meet regularly with Committee for focused discussions
- ❑ Review & prioritize existing information
- ❑ Contract a technical expert for strategic planning guidance
- ❑ Develop a Strategic Plan Framework
- ❑ Break into Small Groups
- ❑ Reconvene with full Committe and ***share output***
- ❑ Begin Drafting Strategic Plan
- ❑ Request input/comments on Draft Plan
- ❑ Respond to comments, update plan, request acceptance

QAPP and QMP Development

Create a Project Steering Committee

- Meet Monthly for focused discussions around Tidal Wetlands and Strategic Planning
- Experts in the field across the watershed committed to support this effort
- Current count: 48 folks representing Bay jurisdictions w/tidal wetlands: DE/DC/MD/VA
- Shared space: https://drive.google.com/drive/folders/1fPkuyq0KsO5U7lPp-2J_0vqL3syQwiBA

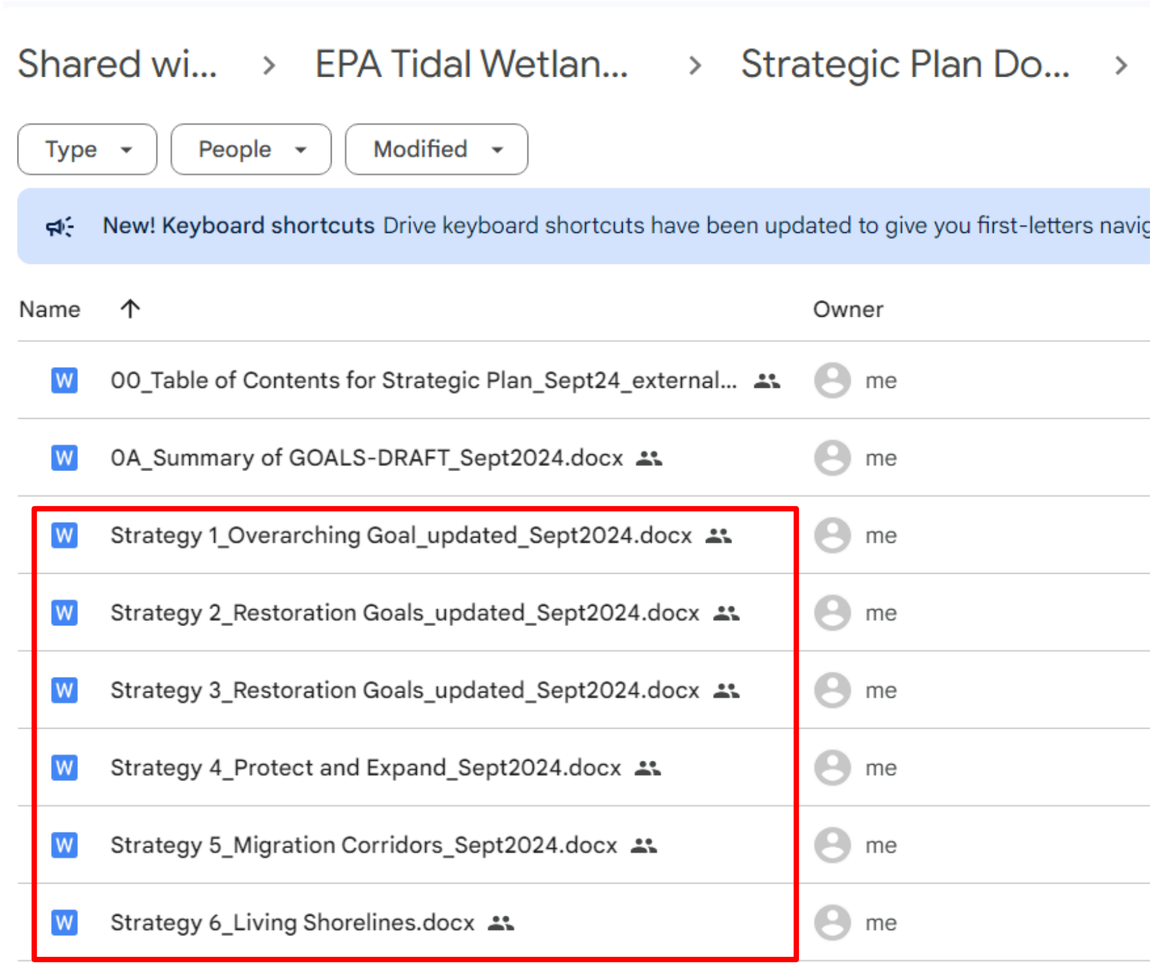
Meeting Purpose and Goals Reminder: work together to shape the Tidal Wetlands Strategic Plan for the Chesapeake Bay Watershed. Our goal is to have focused discussions that are action-oriented to move the Strategic Plan forward and stay on schedule. **This meeting will focus on the Tidal Wetlands Strategic Plan Progress and Updates!**

Charge Reminder: The Chesapeake Bay Trust is leading the Tidal Wetlands Capacity Building work supported by EPA CBPO for strategic planning, capacity building, landowner/community engagement, program sustainability/financing, and project design. We are completing strategic planning first so this can guide us on the other tasks. We are looking to you, the experts in this field, to realize the best outcomes together.

Allow Time/Space for FEEDBACK from members!

EXAMPLE of Homework:

- Review Goals, Strategies, Objectives, and Key Actions!
- Folder: "**Draft Sections for Review by PSC"**
  - https://drive.google.com/drive/folders/1b4khEiS7vSzZdA6LgNhlvd8FVBZtZRMY?usp=sharing
- Review your updated Small Group sections
- Submit input to Trust by 9/30/24



Review/Prioritize Existing Information with Committee

- Compile, Review, and Prioritize:
  1. Tools (Models)
  2. Reports/Documents/Studies
  3. Workshops
  4. GIT Projects
- Define Important Guidance Documents with Committee
- Establish a Public Space for Sharing Information

Compilation of Tools Process

Tools (or models) Proposed for Integration in the plan

>50 tools in this spreadsheet characterized by Priority

Focus on the 32 tools denoted as Priority 1 and Priority 2

All tools have a summary and link

ID#	P	Tool Name	Jurisdic	Tool Function/Purpose	Function
T-7	0	Shoreline Management Model – SMM		*Remove due to Overlap*	
T-20	1	Sea-Level Affecting Marshes Model (SLAMM)	WSW	1. Broad-Scale	1
T-33	1	Marsh Adaptation Project's Mapper (Julie Reichert-Nguyen/John	WSW	3. Fine-Scale	1
T-34	1	TNC Marsh Management Decision Support Tool (Michellle Canick)	WSW	1. Broad-Scale	1
T-41	1	Coastal Ecosystem Services for Mid-Atlantic States	WSW	2. Tool to assess wetland	2
T-51	1	EPA EJ screen	WSW	2. Tool to assess wetland	2
T-54	1	Tidal Marsh Model	WSW	3. Fine-Scale	3
T-16	1	Black Duck Decision Support Tool (DST)	WSW	2. Tool to assess wetland	2
T-21	1	Wetland Assessment Tool for Condition & Health (WATCH)	WSW	3. Fine-Scale	3
T-50	1	Delmarva Restoration and Conservation Network (DRCN) Maps	MD/DE	2. Broad-Scale	2
T-12	2	Outcome Tracker of Wetlands Outcome	WSW	2. Tool to assess wetland	2
T-13	2	NOAA Environmenta		Scale	1
T-14	2	Saltmarsh Sparrow		assess wetland	2
T-15	2	Black Rail Potential		assess wetland	2
T-19	2	Chesapeake Bay Ha		assess wetland	2
T-22	2	Relative Wetlands V		assess wetland	2
T-23	2	EPA's Adaptation De		Scale	1
T-35	2	USGS Coastal Chang		assess wetland	2
T-4	2	Chesapeake Bay 1-n		Scale	1
T-42	2	@Bruce		assess wetland	2
T-45	2	Marsh Equilibrium Model - Jim Morrisons Lab in S. Carolina -	WSW	3. Fine-Scale	3
T-18	3	Structured Decision Making (SDM)	WSW	N/A - not a tool	
T-24	3	Watershed Resources Registry (WRR)	WSW	1. Broad-Scale	1
T-25	3	Chesapeake Assessment Scenario Tool (CAST)	WSW	1. Broad-Scale	1
T-26	3	*FUTURE - High-Resolution Land Use/Land Cover Data Project and*		*FUTURE TOOL*	

Similar Strategy with Other References

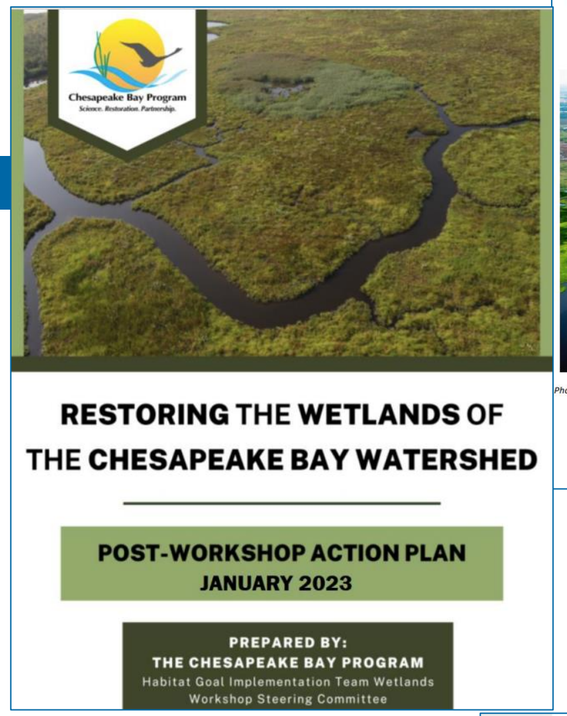
- Documents: compile existing (and future) documents for integration in the Strategic Planning Process
  - Characterize by Priority #
  - Focus on the top documents
- Workshops: compile Workshops with Outcomes Proposed for Integration (past and future proposed workshops)
- Past and In-Progress Projects:
  - Consider GIT Projects
  - Potential Overlap
  - Awareness of Concurrent/Future Projects

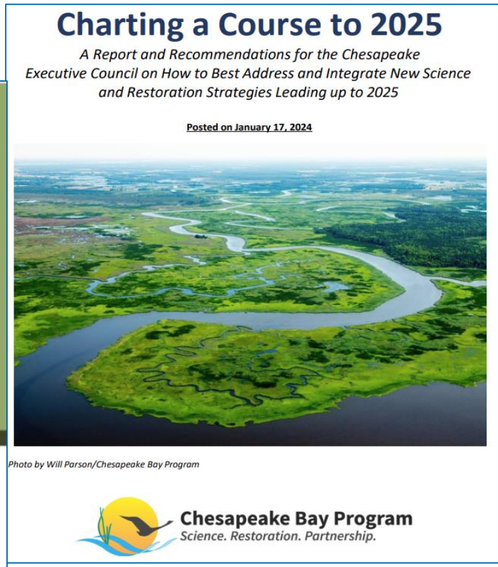
NOTES: Input from Committee is KEY (they are the experts)!
Be flexible; new data coming online regularly

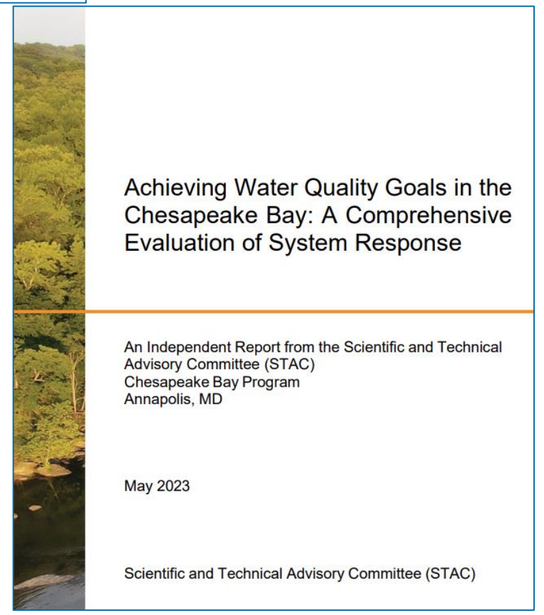
Define Important Guidance Documents

1. Wetlands Action Plan: Restoring the Wetlands of the Chesapeake Bay Watershed
2. Charting a Course to 2025 A Report and Recommendations for the Chesapeake Executive Council
3. Achieving Water Quality Goals in the Chesapeake Bay: A Comprehensive Evaluation of System Response (CESR)

NOTE: Communicating the guiding documents is KEY for the understanding and success of your contractor







Know when you need an EXPERT!

1. Release a competitive RFP with clear deliverables and criteria
2. Create a technical review committee for scoring applications
3. Choose a qualified contractor
4. Incorporate contractor into process

ERG

Tidal Wetlands Strategic Planning Team

Chesapeake Bay Trust

Sea Grant
Maryland

Plan Development Approach and Methodology

Conduct a Situational Assessment and Develop a Draft Framework:

- Coordinated with Trust and Steering Committee to review background materials
- Conducted **23 interviews** and a **situational assessment** to obtain a snapshot of the current status, strengths, and weaknesses of tidal wetland protection initiatives and document the main concerts to the Committee.
- **Recorded, collated, and coded** all interview notes to inform key themes, topics, concerns, and develop Strategic Plan framework.
- Presented **framework** and received feedback during a Steering Committee meeting.
- Through ongoing feedback and Steering Committee discussions, conducted a **"stress test"** to evaluate how the plan may function based on difficult circumstances.
- Draft a Strategic Plan Report from framework with the following: vision, goals, strategies, objectives, and key actions

Plan Development Approach and Methodology

Develop the Vision, Goals, Objectives, and Actions:

- Developed and implemented a collaborative approach to refine plan themes and develop key elements
- Designed a schedule and process to break into **small group meetings by GOAL** to efficiently gather input from the Steering Committee to inform strategies, objectives, and actions.
- Developed a **logic model framework** to guide input received from groups.
- Compiled input from small groups and analyzed input to identify **common themes and gaps.** Evaluated actions against criteria, such as:
  - Do the objectives and actions presented by the small groups help to achieve the goals and advance the vision of this plan?
  - What opportunities are there to leverage objectives and actions posed by the small groups to develop comprehensive strategies that will have the greatest impact?

Plan Vision

Developed through a collaborative process with the Steering Committee, the Plan includes the following vision for the Chesapeake Bay tidal wetlands.

A healthy network of tidal wetlands within the interconnected landscape of the Chesapeake Bay are equitably protected and made more resilient through conservation, restoration, and enhancement. These tidal wetlands are protected through a collaborative effort to support communities, aquatic systems, wildlife, climate resilience and mitigation, water quality, and the economy of the Bay.

High-Level Process for Draft Strategic Plan

- **Plan Development Approach and Methodology:** define the KEY strategic planning terms (vision, goals, strategies, objectives, actions, cross-cutting strategies)
- **Work in Small Groups:** build out each defined strategy with detailed objectives and actions

Small Group Charge & Topics

Purpose: Project Steering Committee Members will **move forward the Topics** Proposed in the Draft Framework by collaborating as SMALL GROUPS (Framework Developed from ERG Listening Sessions)

Goals: Each small group meets individually to ***further refine proposed topics for inclusion in the Tidal Strategic Plan***

Charge: Work as a Team to define the Goals and Key Actions of your Small Group Topic. Each group will present to the full Project Steering Committee for input and refinement

Membership: Facilitator, Leader/Spokesperson, Contributing Members

Meetings: Schedule HW and meet with Group

Topic 1: Restoration of Large-Scale Tidal Marshes

Topic 2: Restoration of Living Shorelines

Topic 3: Protection/Conservation of Marshes (+Migration Corridors)

Topic 4: Landowner Outreach and Engagement

Topic 5: Cross-Collaboration (+Policy Alignment/Research)

Goals	Clearly defined, actionable, and measurable conditions achieved through meeting objectives. Broad enough to capture long-term aspirations but tailored to be achievable with the program's resources. • Near term • Long term
Objectives	Outcomes in the short term that contribute to achieving goals.
Strategies	Methods or actions applied to achieve stated goals and outcomes.
Key Actions	Specific activities that are assigned to teams, partners, and staff that occur across the timespan of the project. • Short term: 0-5 years • Medium term: 5-10 years • Long term: 10+ years

Results of Small Groups:

Goals ▶

Strategies ▶

Objectives ▶

Timescale of Objectives:
1. Immediate Objective (1-year target)
2. Near-Term Objective (by 2030)
3. Long-Term Objective (by 2050)

▼

Key Actions

REMINDERS:

- Goals: Clearly defined, actionable, and measurable conditions and multiple timeframes.
- Strategies: Methods applied to achieve stated goals and outcomes. These are typically broad and encompass multiple goals.
- Objectives: Outcomes (i.e., changes in ecosystem condition, behavior, and policy) with a timescale that contributes to achieving goals.
- Key Actions: Specific activities that occur across the timespan of the plan.

Cross-Cutting Approaches: these activities are multi-collaborative and motivating actions that will provide support for key strategies

Goals and Strategies to Protect and Restore Tidal Wetlands

OVERARCHING GOAL: PROTECT AND RESTORE TIDAL MARSHES

- **Strategy 1:** Develop specific goals and acreages for tidal wetlands in the Chesapeake Bay by jurisdiction, including comprehensive spatial and temporal outcomes.

GOAL: MANAGE AND RESTORE LARGE-SCALE TIDAL MARSHES

- **Strategy 2:** Actively manage existing and protected large-scale tidal marshes in Chesapeake Bay to support key indicator species, habitats, communities, and local economies.
- **Strategy 3:** Restore, enhance, and create large-scale tidal marshes in the Chesapeake Bay Watershed to support key indicator species, habitats, communities, and local economies.

GOAL: PROTECT AND EXPAND TIDAL MARSHES, INCLUDING CONSERVATION OF MIGRATION CORRIDORS AND LIVING SHORELINES

- **Strategy 4:** Protect and expand marshes in the Chesapeake Bay, focusing on high-quality habitats to support the health of existing marshes
- **Strategy 5:** Conserve and facilitate the migration of tidal marshes in the Chesapeake Bay to minimize loss of function, benefits, and acreage as a result of sea level rise.
- **Strategy 6:** Protect existing and create new living shorelines and shallow water habitat to enhance community resilience to natural hazards, climate change, and provide protection, ecosystem services, and benefits to species.

+ GOAL: IMPLEMENT CROSS-CUTTING APPROACHES: activities are multi-collaborative and motivating actions

EXAMPLE:

GOAL: MANAGE AND RESTORE LARGE-SCALE TIDAL MARSHES

Strategy 2: Actively manage existing and protected large-scale tidal marshes in the Chesapeake Bay Watershed to support key indicator species, habitats, communities, and local economies.

RATIONALE: Many large-scale tidal marshes are passively managed. ***Transitioning from passive to active management*** requires strategic interventions to enhance marsh functionality and ecosystem services. This cannot be achieved without a clear site-specific plan for marsh management.

Immediate Objective (1-year target): Conduct a comprehensive inventory of jurisdictional-owned and federally-owned tidal marshes within the Chesapeake Bay Watershed that are passively managed and require a shift to active management.

Near-Term Objective (by 2030): Develop and implement detailed Wetland Management Plans (WMPs) for prioritized wetlands.

Long-Term Objective (by 2050): Achieve active management benchmarks for identified and prioritized tidal marshes through implementation of actions in WMPs.

Action 1: Develop Wetland Management Plans (WMPs)	**Description:** Write and adopt WMPs for prioritized marshes that encompass large-scale wetland conservation strategies, ensuring alignment with ecological and economic objectives and incorporation of shallow water habitat; add new marshes to list as applicable.	**Outputs:** Large-Scale WMPs **Success Indicator:** All identified priority marshes will be governed by comprehensive WMPs to ensure clear steps towards restoration **Effective Example:** Guinea Marsh Wildlife Management Area WMP in VA
Action 2: Incorporate shallow-water habitat in marsh management	**Description:** Evaluate opportunities to manage Shallow water habitat in wetland management to enhance local water quality and advance SAV recovery efforts; avoid shallow-water use conflicts and habitat trade-offs with SAV recovery and riparian buffer plantings.	**Outputs:** XXX **Success Indicator:** XXX **Effective Example:** XXX
Action 3: Manage tidal marshes, with a focus on hydrology and elevation	**Description:** Where proven to ensure the creation or maintenance of quality habitat through time. management strategies should include the following: runnels, weirs, tide gates, sediment additions (i.e., TLP), elevation control/grading, erosion control, remove physical barriers (i.e., berms, impervious surface), invasive species management (nutria, Phragmites, etc.), and vegetation: planting and/or stabilization controls.	**Outputs:** XXX **Success Indicator:** XXX **Effective Example:** Blackwater NWR
Action 4: Manage tidal marshes for invasive species	**Description:** Support effective management of invasive species, including practices to manage invasive aquatic and terrestrial vegetation plant and animal species, as well as other species that may become a future concern. Develop criteria in managed marshes and beyond for ongoing control and removal of invasive species detrimental to the health of wetlands.	**Outputs:** XXX **Success Indicator:** XXX **Effective Example:** Delmarva Nutria eradication
Action 5: Adopt tiered management approach	**Description:** Use a tiered/temporal approach to manage existing marshes for resiliency (improve hydrology, increase elevation, protect edge); focus on low-tech hydrological projects that can move forward in the short term.	**Outputs:** XXX **Success Indicator:** XXX **Effective Example:** XXX

Comment: will add "Responsible Party/Stakeholder" to the actions in plan for clarity and planning purposes

Lessons Learned & Common Themes

- Pull key folks into process early for commitment – get calendar holds out early and be consistent
- Set goals and homework – use time thoughtfully in meetings; stick to agendas
- Create a public space to share information
- Steering Members are smart and experienced but busy with their full-time jobs (input from field folks & regulatory is key)!
- Step back and consider if overlap is occurring; collaborate when possible and be willing to listen
- Consensus Building Process requires PATIENCE!
- Contract an expert when outside of your comfort zone; can also serve as a "neutral" force
- New data and reports are constantly coming online; be flexible and willing to adjust and pivot (build in adaptive management)
- Don't forget to poll the "quieter folks" whose resources and voices are also important (follow-up meetings?)
- Don't waste time fighting over words (pull in academics to help define)
- Employ a consensus continuum for final agreement/acceptance
- Communicate regularly with your "bosses"

Next Steps

- Draft Strategic Plan <u>to be reviewed</u> by Wetland Workgroup
- Trust to respond to comments on draft and Finalize Strategic Plan
- Wetland Workgroup will “vote” to accept Tidal Strategic Plan and present to EPA CBP
- Finalize Plan to inform tidal wetland protection and restoration efforts

COMMENT QUESTIONNAIRE:

Draft Tidal Wetlands Strategic Plan Questions

Questionnaire to ensure important Key Actions are captured in Strategic Plan

Chesapeake Bay Trust

bitly

Name *
Email *
Organization/Affiliation *

Do you generally agree with the Draft "Goals" and "Strategies" proposed for the Strategic Plan? If not, please provide detailed suggestions for improvements and/or changes: *

Are there any MISSING "Key Actions" in the Draft Strategic Plan? If so, please add "Key Actions" that should be included and the Goal/Strategy/Objective they fall under: *

Can you make any suggestions for improvements to our process and/or the Draft Strategic Plan sections so far?

Google Forms

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PARTNERING FOR RESULTS

Chesapeake Bay Trust