Strategy Review Guidance

Considerations for Revising Management Strategies through the SRS

Background

This document summarizes conversations the SRS Planning Team has had about possible considerations GITs should make while updating their Management Strategies. Any guidance on updating Management Strategies should be incorporated into the Quarterly Progress Meeting Guide to consolidate guidance materials and ensure Quarterly Progress meetings focus on explaining and documenting Management Strategy changes.

Information in *italics* is already included in the current version (updated October 17, 2017) of the Quarterly Progress Meeting Guide.

Instructions

This document outlines the changes lead GITs should make to individual Management Strategies based on a GIT or Workgroup's experience filling out the Logic Table and moving through the Decision Framework. You should use the documents you completed in preparation for your Quarterly Progress Meeting to update your Management Strategy, and your Management Strategy, Two-Year Work Plan and Logic Table should be consistent with one another. In other words, each section of your revised Management Strategy should reflect or discuss what you learned while preparing for your Quarterly Progress Meeting, and include a description of your plans for the future.

Recommended Changes to the Management Strategy

I.   Introduction

Is new information available that describes the importance of the outcome or its connection to and impact on other outcomes? Describing these new understandings here will document and support the adaptive management process. You should also consider whether any of the information presented at the Two-Day Biennial Review Meeting addressed changes in the scientific, fiscal or policy fields that are relevant to your outcome.

II.   Goal, Outcome and Baseline

The goal and outcome text will not change in this section **unless** the PSC has approved a change to the relevant outcome **or** the EC has approved a change to the relevant goal.

The Baseline and Current Condition section should be updated for those outcomes for which a new or revised baseline has been established. This section should **not** be updated with annual progress, unless such progress has warranted a change in approach.

III.   Participating Partners

This section could change with the input of partners who have confirmed their continued participation or requested to be removed. This input should be requested at your Quarterly Progress Meeting and throughout the Management Strategy review process. Give particular attention to the Local Engagement section, and be sure to provide information that reflects the Watershed Agreement's

emphasis on involving local leaders and could prove relevant to or helpful in updating the Local Leadership Management Strategy and Work Plan.

IV.   Factors Influencing Success

This section should be revised to ensure it is consistent with your Logic Table and Work Plan. Use the materials you developed in preparation for your Quarterly Progress Meeting (e.g., a completed Logic Table, which illustrates the logic behind actions in your work plan). This section should use generic headings to describe factors before providing more detail; for a list of these headings, see Appendix B of this document. In addition to describing those factors that will be managed through your management approaches and actions, you should describe any **critical** but unmanageable factors, as well as your plans to monitor these factors to ensure whether assumptions about their impact remain accurate or a link to any efforts that currently exist to manage these factors. This section allows us to understand "the universe of factors critical to achieving the outcome," while the next section—Current Efforts and Gaps—explores the gaps in managing these factors that the Chesapeake Bay Program can fill.

V.   Current Efforts and Gaps

This section should be edited for any significant changes in outside efforts that affect a gap analysis. *For example, has a partner recently initiated a program that fills a significant gap? Or has the discontinuation of a partner program created a new gap?* Consider information about changing scientific, fiscal or policy conditions presented at the Two-Day Biennial Review Meeting. A detailed description of every current effort may not necessary, depending on the number of current efforts and the level of familiarity of the coordinator with these efforts.

VI.   Management Approaches

Management approaches should change if any of the following applies and was discussed at the Quarterly Progress Meeting:

- You have completed work on a management approach.
- The assessment of progress suggests that a management approach is not having the intended effect.
- You have identified a more effective management approach.
- New information, *including the identification of new factors,* is available to support a change or shift in management approach, or the addition of a new management approach.
- A new gap is identified and the outcome cannot be achieved if the gap is not filled.
- New efforts have begun and an approach is no longer needed.

The revised section should document the changes and explain the reasoning behind them, referencing supporting materials like the Logic Table, Work Plan, and other GIT documents.

VII.   Monitoring Progress

If a monitoring program has been added or changed, or an indicator for the outcome has been created since the Management Strategy was drafted, this section should be revised to describe how a GIT will use the indicator or information to monitor progress. Consider any information needed about factors, actions, or progress that you need to know in order to make informed and defensible decisions about continuing or altering a strategy. Are we doing what we said we would do? Are we monitoring our critical assumptions? Will the monitoring data be able to track progress of the action over time?

VIII.   Assessing Progress

This section should reflect expectations about your rate of progress, as well as any uncertainties surrounding these expectations. This section could also incorporate new opportunities the Strategy Review System (SRS) offers to assess progress. Has the team documented or set expectations for the change they expect to see from their actions? Are the actions having the expected effect, given how certain the team is about their documented expectations? Is the team comfortable with the progress to date (i.e. Is the monitoring data showing progress consistent with the expected trajectory or trend line within the team's established level of uncertainty)?

IX.   Adaptively Manage

This section should describe how a GIT will use its assessment of progress to adaptively manage its approaches and actions and reduce the uncertainty around the actions taken. In other words, when will information or evidence on progress (or lack thereof) warrant a change of course? Is the data showing expected progress, given any documented uncertainty? Is the data showing no progress or progress outside the level of uncertainty? Has the team learned enough to be able to make adjustments to reduce their uncertainty in implementing the approach? Any change in strategy implies an improvement in understanding of the system and that change should be documented.

X.   Biennial Work Plan

The only change warranted in this section should reflect the fact that work plans do not describe "estimated resources".