Biennial Strategy Review System: Logic Table and Work Plan

Instructions: The following Logic Table should be used to articulate, document, and examine the reasoning behind your work toward an Outcome. Your reasoning—or logic—should be based on the Partnership's adaptive management decision framework. This table allows you to indicate the status of your management actions and denote which actions have or will play the biggest role in making progress.

Some Management Strategies and Work Plans will not immediately or easily fit into this analytical format. However, **all GITs should complete columns one through four** to bring consistency to and heighten the utility of these guiding documents. The remaining columns are recommended for those who are able to complete them. If you have any questions as you are completing this table, please contact SRS Team Representative and Indicators Coordinator Laura Free (free.laura@epa.gov).

The instructions below should be used to complete the table. An example table is available on the GIT 6 webpage under "Projects and Resources".

1. For the first round of strategic review (2017-2018): Use your existing Work Plan actions to complete the **Work Plan Actions** section first. Make sure to number each of the actions under a high-level Management Approach, as these numbers will provide a link between the work plan and the logic table above it. Use color to indicate the status of your actions: a green row indicates an action has been completed or is moving forward as planned; a yellow row indicates an action has encountered minor obstacles; and a red row indicates an action has not been taken or has encountered a serious barrier.
2. **Required:** In the column labeled **Factor**, list the significant factors (both positive and negative) that will or could affect your progress toward an Outcome. The most effective method to ensure logic flow is to list all your factors and then complete each row for each factor. Consult our Guide to Influencing Factors (Appendix B of the Quarterly Progress Meeting Guide) to ensure your list is reasonably comprehensive and has considered human and natural systems. Include any factors that were not mentioned in your original Management Strategy or Work Plan but should be addressed in any revised course of action. If an unmanageable factor significantly impacts your outcome (e.g., climate change), you might choose to list it here and describe how you are tracking (but not managing) that factor.
3. **Required:** In the column labeled **Current Efforts**, use keywords to describe existing programs or current efforts that other organizations are taking that happen to support your work to manage an influencing factor but would take place even without the influence or coordination of the Chesapeake Bay Program. You may also include current efforts by the Chesapeake Bay Program. Many of these current efforts may already be identified in your Management Strategy; you may choose to link the keywords used in this table to your Management Strategy document for additional context. You may also choose to include some of these efforts as actions in your work plan; if you do, please include the action's number and hyperlink.
4. **Required:** In the column labeled **Gap**, list any existing gap(s) left by those programs that may already be in place to address an influencing factor. These gaps should help determine the actions that should be taken by the Chesapeake Bay Program through the collective efforts of Goal Implementation Teams, Workgroups, and internal support teams like STAR, or the actions that should be taken by individual partners to support our collective work (e.g., a presentation of scientific findings by a federal agency to a Chesapeake Bay Program workgroup).
5. **Required:** In the column labeled **Actions**, list the number that corresponds to the action(s) you are taking to fill identified gaps in managing influencing factors. Include on a separate line those approaches and/or actions that may not be linked to an influencing factor. To help identify the action number, you may also include a few key words. Emphasize critical actions in **bold**.
6. **Optional:** In the column labeled **Metric**, describe any metric(s) or observation(s) that will be used to determine whether your management actions have achieved the intended result.

7. **Optional:** In the column labeled **Expected Response and Application**, briefly describe the expected effects and future application of your management actions. Include the timing and magnitude of any expected changes, whether these changes have occurred, and how these changes will influence your next steps
8. **Optional:** In the column labeled **Learn/Adapt**, describe what you learned from taking an action and how this lesson will impact your work plan or Management Strategy going forward.

Enhance Partnering, Leadership and Management Goal Implementation Team Logic Table and Work Plan

Primary Users: Goal Implementation Teams, Workgroups, and Management Board | Secondary Audience: Interested Internal or External Parties
Primary Purpose: To assist partners in thinking through the relationships between their actions and specific factors, existing programs and gaps (either new or identified in their Management Strategies) and to help workgroups and Goal Implementation Teams prepare to present significant findings related to these actions and/or factors, existing programs and gaps to the Management Board. | Secondary Purpose: To enable those who are not familiar with a workgroup to understand and trace the logic driving its actions.
Reminder: As you complete the table below, keep in mind that removing actions, adapting actions, or adding new actions may require you to adjust the high-level Management Approaches outlined in your Management Strategy (to ensure these approaches continue to represent the collection of actions below them).
Long-term Target (the metric for success of Outcome): **TBD**
Two-year Target (increment of metric for success): **TBD**

Mission Statement (current): Continually improve the leadership and management of the CBP and assist watershed partners and stakeholders in building their capacity to become environmental leaders in their community.
Mission Statement (revised): TBD

KEY: Use the following colors to indicate whether a Metric and Expected Response have been identified.	
Metric	Specific metrics have not been identified
	Metrics have been identified
Expected Response	No timeline for progress for this action has been specified
	Timeline has been specified

Factor	Current Efforts	Gap	Actions (critical in bold)	Metrics	Expected Response and Application	Learn/Adapt
What is impacting our ability to achieve our outcome?	**What current efforts are addressing this factor?**	**What further efforts or information are needed to fully address this factor?**	**What actions are essential to achieve our outcome?**	***Optional: Do we have a measure of progress? How do we know if we have achieved the intended result?***	***Optional: What effects do we expect to see as a result of this action, when, and what is the anticipated application of these changes?***	***Optional: What did we learn from taking this action? How will this lesson impact our work?***

| **WORK PLAN ACTIONS** |

| **Green** - action has been completed or is moving forward as planned   **Yellow** - action has encountered minor obstacles
 Red - action has not been taken or has encountered a serious barrier. |

Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Geographic Location	Expected Timeline
**Work Theme (Management Approach) 1: Evaluation and Adaptive Management**
1.1	Biennial Strategy Review System (SRS)		SRS Small Group (with GIT 6 Members, Management Board, STAR, STAC, GIT Chairs, Coordinators and Staffers)		Ongoing
1.2	Independent Evaluator	Participate in discussions with EPA to determine an approach to meet statutory requirements of CBARA.	Carin Bisland (with Greg Allen, Laura Free)		Ongoing – Discussions **completed**. Issue on hold pending direction from PSC.
**Work Theme (Management Approach) 2: Enhancing/Improving the Partnership's Functionality**
2.1	Governance of the Partnership	Ensure that GITs develop membership criteria and present to MB, per the 2015 Governance Document update.	Emily Freeman (with All GITs, Diversity Action Team, and Climate Change Workgroup)		June 2016 – GITs were reminded about this charge at the 11/5/15 coordinator staffer meeting. GIT 6 to discuss at January 2016 meeting.
		Collect suggested revisions and updates to the Governance Document to be kept for annual review and revision.	Emily Freeman (any Partnership stakeholder may offer a suggested revision)		July 2015 - May 2016
		Convene Governance Document Action Team to review suggested revisions and make any updates.	Emily Freeman (with Dave Goshorn, Carin Bisland, Greg Allen)		May - June 2016

WORK PLAN ACTIONS

Green - action has been completed or is moving forward as planned   **Yellow** - action has encountered minor obstacles
Red - action has not been taken or has encountered a serious barrier.

Action #	Description	Performance Target(s)	Responsible Party (or Parties)	Geographic Location	Expected Timeline
2.2	Chesapeake Stat	Complete discovery research for Chesapeake Decisions.	Doreen Vetter (with Chesapeake Stat team)		June 2016 – **Completed** first phase, starting second phase.
		Begin design and development for Chesapeake Decisions.	Doreen Vetter (with Chesapeake Stat team)		June 2016 – In progress, put on hold per direction from MB.
2.3	Meeting management improvements	Evaluate new options in web conferencing technology for GIT 6 use.	Emily Freeman (with EPA Region 3 IT staff, Megan Thynge)		TBD
		If successful, present these new options to other CBP groups to use to improve meeting management across the partnership.	Emily Freeman		Dependent on above
2.4	Improving internal communication within the Partnership	Promote the use of SharePoint within GIT 6 and the partnership as a tool for collaboration.	All GIT 6 members		Ongoing
Work Theme (Management Approach) 3: GIT 6 Administration					
3.1	GIT 6 Membership	Draft initial guidance on GIT 6 membership criteria to be discussed with GIT. Reach consensus on who else might be invited to join GIT 6.			TBD – Initial discussion at November GIT 6 meeting.
		Present updated mission statement and criteria for membership to MB, per Governance Document protocols.	Dave Goshorn, Carin Bisland		