Chesapeake Bay Program Facilitation Questions to Guide Coordinators, Staffers and Chairs through the Logic & Action Plan	
Logic & Action Plan Guidance	**Facilitation Guidance & Questions**
Long-term Target and Two-Year Term Target Statements	
• Create or Update the target statements: The Logic & Action Plan's outcome statement, long-term target and two-year target reflect the metrics for success in achieving the goals and outcomes of the *2014 Chesapeake Watershed Agreement*. – Long-term Target is the metric for success of Outcome. – Two-year Target is the increment of metric for success. • When to Fill Out: The long-term target and two-year target statements should be reviewed per the pre- and post-Quarterly Progress Meetings.	• Objective: Set goals – Identify the specific outcome the GIT is working toward. • It should be acknowledged with the GIT or workgroup that strategies in the Logic & Action Plan may have changed since the statement was first articulated. • To help generate discussion and ideas about developing new statements, the facilitator may consider the back-casting exercise (see Facilitation Techniques) by asking "*what needs to exist for this vision (outcome) to be reached?*" GIT or workgroup members can look at the long-term and two-year team steps. • A combination of facilitation techniques, such as brainstorming and polling can be used to have input for the following discussions: Developing a Revised Long-term Target: – *What is our metric of success in achieving our outcome by 2025?* – *What do we need to aim for by 2025 to successfully achieve the outcome?* – *Does our original long-term target need to be changed to reflect what we have learned over the last two years? How should it be revised?* Developing a Revised Two-Year Target: – *What do we need to aim to achieve in the next two years to help the Partnership meet our 2025 outcome?)* – *How does this target compare to the last cycle's target? Did it help us make progress towards our outcome and goals? How should it be revised?*
Column 1: Factor – *What is impacting our ability to achieve our outcome?*	
• Create or Update Column 1: List the significant human or natural factors that could impact the Chesapeake Bay Program's ability to achieve an outcome. – Both positive and negative factors – whether they can be managed or not – should be included and should be	• Objective: Describe factors influencing goal attainment – Identify and prioritize all factors that influence progress toward the outcome. • New ideas or a confirmation of the factors influencing success may be generated through a blank slate rather than reviewing the current list of factors to help identify new factors that may have evolved over the past two years. New ideas may be generated using a blend of

consistent with the factors identified in your Management Strategy. • When to Fill Out: This column should only be updated, if needed, after your Quarterly Progress Meeting. – These updates should be guided by your responses to questions one through three in your Narrative Analysis. • Related Analysis: Question #3 of Narrative Analysis: What scientific, fiscal and policy-related developments will influence your work over the next two years?	facilitation techniques such as polling. Questions may include: Identifying Factors on a Blank Slate: – *What influences our success or our effectiveness in meeting our outcome? (Consider a word cloud question via Mentimeter.)* – *What are the things that have limited our ability as a Partnership to get this work done?* – *Are there scientific, fiscal and/or policy-related developments that may influence our work over the next two years?* Prioritizing our Influences: – *Which of these barriers are best tackled as a Partnership/GIT/workgroup (vs. individual organizations)?* – *Of the list of factors we have brainstormed, what are the ones that have the greatest impact through the Partnership/GIT/workgroup to meet our outcome? (Consider a quadrant analysis question via Menti.) Recommendation: Do not limit defining what has the greatest impact over the next two years, but focus on the greatest impact in effectively meeting the overall outcome.* • Compare the factors that were developed during the last two-year cycle and get initial reactions to what previous factors should remain or stay. Compare to those themes listed in the Management Strategy and discuss if these the themes are still relevant. If they no longer apply or need to be updated, discuss the needed changes to the Management Strategy.
Column 2: Current Efforts – *What current efforts are addressing this factor?*	
• Create or Update Column 2: List the current efforts that are supporting the Bay Program's work to manage the factors identified in column one. – These efforts could come from within or outside of the Bay Program and could be deliberately or unintentionally supporting the partnership's work. • When to Fill Out: This column should only be updated, if needed,	• Objective: Assess current management efforts that address the important factors affecting outcome attainment. • Assess the factors from the previous SRS cycle by discussing the responses to the following questions: Factors that Remain from the Last Cycle: – *Why do these factors continue to be barriers?* – *What is getting in the way of addressing these barriers?* – *What is the current situation in addressing these barriers?* Factors that are being Removed from the Last Cycle: – *Can we claim those as successes of our actions? What did we learn from those successes?*

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<tr><td>after your Quarterly Progress Meeting.
– These updates should be guided by your responses to questions one through three of your Narrative Analysis.</td><td>– If we can't claim these as successes, why are they being removed? What did we learn from these factors?
– Can these barriers be modified so that they continue to be a focus?
<u>New Factors being included in the Next Cycle</u>:
– What is getting in the way of addressing these barriers?</td></tr>
<tr><td colspan="2">Column 3: Gap – What further efforts or information are needed to fully address this factor?</td></tr>
<tr><td>• <u>Create or Update Column 3</u>: List the gaps that remain despite current efforts to manage the factors identified on column 1.
– Describe efforts that, if achieved, would manage each of the listed factors.
– After reviewing your existing Management Strategy, add any new unfilled gaps and remove any previous gaps that have been filled.
• <u>When to Fill Out</u>: This column should only be updated, if needed, after your Quarterly Progress Meeting.
– These updates should be guided by your responses to questions one through three of your Narrative Analysis.</td><td>• <u>Objective</u>: Assess current gaps – Identify gaps and overlaps in the existing management programs that address the important factors affecting outcome attainment.
• Assess efforts to address the factors that the group has agreed to focus on for the upcoming cycle:
<u>Factors that Remain from the Last Cycle</u>:
– How are we currently addressing these barriers?
– What are the gaps that continue to exist despite the current efforts that are being done?
– What further efforts are needed to fully address these barriers?
<u>New Factors being included in the Next Cycle</u>:
– What is the current situation in addressing these barriers?
– What further efforts or information is needed to address these barriers?</td></tr>
<tr><td colspan="2">Column 4: Actions – What actions are essential (to help fill this gap) to achieve our outcome?</td></tr>
<tr><td>• <u>Create or Update Column 4</u>: List the essential actions that will be taken to fill the gaps over the next two years.
– These short-term actions should support the long-term management approaches identified in your Management Strategy.
– If changes in your understanding or partnership progress has led to changes in any of your management approaches, your new actions should reflect those changes.</td><td>• <u>Objective</u>: Outline the steps for achieving the outcome and coordinating actions among partners and stakeholders. The strategy is implemented in two-year increments.
• When preparing for the nextcycle of the SRS, the GIT or workgroup should identify new ideas on actions needed to address the gaps. Then review the original actions to see if they still apply, need to be modified, or whether they should be removed.
<u>Review Actions from the Last Cycle</u>:
– For green actions: what best practices or lessons learned can we apply in the next cycle?
– For yellow or red actions:
▪ What are we currently doing to overcome our barriers? Do these actions need to be revised?</td></tr>
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- These new actions (or carry-over actions from your previous two-year work plan) could be led by a team within the Bay Program or by a partner.

- <u>When to Fill Out</u>: Three months before your Quarterly Progress Meeting, review your existing actions and highlight each action as green, yellow or red. This will be your pre-Quarterly Progress Meeting Logic & Action Plan.
  - This column is updated with new actions after your Quarterly Progress Meeting and saved as the post-Quarterly Progress Meeting Logic & Action Plan.
- <u>Related Analysis: Narrative Analysis Question #1</u>: Examine your red/yellow/green analysis of your management actions. What lessons have you learned over the past two years of implementation?
  - Summarize what you have learned about what worked and what didn't.

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- *Do the incomplete actions (those marked yellow or red) in the Logic & Action Plan still apply? If so, do they need to be modified based on what we have learned from the last cycle?*

<u>New Actions to Address Gaps</u>:

- *What are the opportunities to address these barriers?*
- *What are our essential actions needed to address these gaps?*
- *What are our steps and/or approaches in achieving our goals? (Consider the back-casting exercise. See Facilitation Techniques.)*

- Once actions have been agreed upon for the coming cycle, the GIT or workgroup should provide more detail in the Actions section of the Logic & Action Plan and identify the following for each action: (1) steps that are needed (performance targets) for each of the actions; (2) responsible parties; (3) geographic location; and (4) expected timeline.

<u>Complete the Actions for the next 2 years</u>:

- *For each action, what do we expect to change in the system (performance target); and what are the bounds of certainty for the area impacted (geographic location) and time for change in the system (expected timeline*).

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<td colspan="2">Column 5: Metrics – What will we measure or observe to determine progress in filling identified gap?</td>
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- <u>Create or Update Column 5</u>: List the metrics that will be used to determine whether the actions in column four have addressed all or a portion of the gaps in column three.
  - Describe the information you will use to assess the effectiveness of your new and ongoing actions in filling management gaps.
- <u>When to Fill Out</u>: This column should be completed after your Quarterly Progress Meeting.
- <u>Related Analysis: Narrative Analysis Question #2 Performance Indicator with Graph</u>: Use editable graph or

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- <u>Objective</u>: Develop monitoring program – Describe how the GIT will measure attainment of the outcome, the expected rate and trajectory of progress, and how effectiveness of the management actions will be determined.
- The GIT or workgroup will provide input on what the monitoring program is or what it will look like to assess if the program is on track with meeting the outcome and actions and determine the effectiveness of the management actions. The following questions will help identify key elements of the monitoring program:

<u>Measuring Attainment of the Outcome</u>:

- *Do we currently have a monitoring program? Do we need to modify it to get the results we are looking for?*
- *What are our goals for our monitoring program?*
- *What are the metrics that will determine progress?*
- *What do we expect our group to be evaluated on?*

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<tr><td>your own chart to illustrate your progress. Explain any gap(s) between our actual progress and our anticipated trajectory.</td><td>– What do we need to consider in our program? What do we need to monitor? How do we monitor it?
– How will we collect and assess the data that we want to monitor? How will we use the data, and how will we communicate the results?
– What are the elements of our strategy that need to be evaluated to assess if we are achieving our outcome?
– Do we need to collaborate with the other outcomes for monitoring purposes?</td></tr>
<tr><td colspan="2">Column 6: Expected Response and Application – How and when do we expect these actions to address the identified gap? How might that affect our work going forward?</td></tr>
<tr><td>• <u>Create or Update Column 6</u>: Describe the expected response and application of the actions in column five.
– How do you expect your planned management actions to fill the identified gaps?
– Include the timing, magnitude and application of any expected changes and indicate how these changes could influence the Chesapeake Bay Program’s work.
• <u>When to Fill Out</u>: This column should be completed after your Quarterly Progress Meeting.
• <u>Related Analysis: Question #2 of Narrative Analysis</u>: Regardless of how successful your short-term progress has been over the past two years, indicate whether we are making progress at a rate that is necessary to achieve the outcome you are working toward.
• <u>Related Analysis: Question #3 of Narrative Analysis</u>: What scientific, fiscal and policy-related developments will influence your work over the next two years?</td><td>• <u>Objective</u>: Assess performance – Compare actual progress toward achieving the outcome with the progress expected when the strategy was developed. Describe whether the short-term actions have filled the identified gaps as expected.
• The GIT or workgroup assesses their progress in the past two years at a rate to meet the outcome by 2025. The following questions will help the group have the discussions to complete the analysis:
<u>Assessing Performance</u>:
– Are we doing what we said we would do?
– Are we achieving our outcome?
– Is our understanding of the system correct?
– What aspects of our monitoring and implementation need to be refined?
– Are we making progress, and is it at the rate to achieve our outcome?
– What are our expectations for how and when the actions will address the gaps?
– How will our work change over the next two years that would impact our actions?
– What scientific, fiscal and policy-related developments will influence our actions in the next two years?</td></tr>
<tr><td colspan="2">Column 7: Lesson/Adapt - What did we learn from taking this action? How will this lesson impact our work?</td></tr>
<tr><td>• <u>Create or Update Column 7</u>: Describe the lessons learned</td><td>• <u>Objective</u>: Manage adaptively – Determine whether management approaches or actions need to change in</td></tr>
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following the implementation of a management action. – What have you learned from taking an action? – How has that lesson lead to adaptation or change? – How will it impact your management approaches or actions in the next two-year cycle? • <u>When to Fill Out</u>: This column will be left blank during the second cycle of the SRS (2019-2021) but will be completed in preparation for each Quarterly Progress Meeting in the third cycle of the SRS. – At that time, you will describe what you learned from taking the actions in column four and comparing the results to the content in columns five and six. • <u>Related Analysis: Question #4 of Narrative Analysis</u>: Based on your responses to the questions above (#1-#3), how will our work change over the next two years? – Describe the adaptations that will be necessary to more efficiently achieve your outcome and explain how these changes will lead you to adjust your management strategy or the actins described in column four of your logic and action plan. – Changes that the workgroup, GIT or Management Board consider significant should be reflected in your management strategy. • <u>Related Analysis: Question #5 of Narrative Analysis</u>: What, if any, actions can the Management Board take to help ensure success in achieving your outcome?	the next two-year cycle, or other adaptations are needed to improve program performance. • In the beginning of the second cycle, the GIT or workgroup will need to apply what was learned in the last cycle to improve performance and meet the outcome. The following questions will help the group to determine how to adapt their efforts: <u>Adapting our Work</u>: – *Does our strategy still align with achieving the outcome?* – *What are we learning? What have we learned over the past two years? What has changed in the past two years that we'll need to consider in assessing our focus in the next two years?* – *How will our work change over the next two years?* – *What decisions and adjustments need to be made in light of new information and changes we have learned in the past two years?* – *Are there any developments that will influence our work in the next two years?* – *What is preventing us from moving forward or accomplishing these actions? Do these actions need to be modified to help make progress?* – *What do we need to change to better align with achieving the outcome?* – *What are your recommendations moving forward in the coming two years?* – *What was our understanding, and how has our understanding changed?* • Determine if direct input or action needed by the Management Board: – *What have we already done to address this need?* – *If this need goes unmet, how does this impact our progress?* – *Can the Management Board help by directing actions by other groups (workgroups, organizations, jurisdictions)?*

– Please be specific as possible. Do you need direct action by the Management Board? Or can they Management Board direct or facilitate action through other groups? – Can you describe efforts the workgroup has already taken to address this issue? – If this need is not met, how will progress toward your outcome be affected? – This assistance may include support from within a Management Board member's jurisdiction or agency.	