

2011 Action Agenda Update

Updating Non-Pressure-Reduction Strategies and Actions: A Step-by-Step Guide

May 26, 2011

This document outlines the steps and processes for updating the strategies and actions related to achieving the non pressure reduction targets. The companion template is where to record the results of your work. There is a separate step-by-step document and template for updating strategies and actions related to achieving the pressure reduction targets.

Schedule Reminder

- Draft templates are due to Martha and Elizabeth no later than **July 15**. Most strategies have an earlier deadline than this date.
- Final templates are due to Martha and Elizabeth no later than **July 22** for incorporation into the draft Action Agenda. The draft will be available for review beginning August 8.
- Revisions based on review will be made in September and October.

Guidelines for Refining Existing and Developing New Strategies Related to Non Pressure Reduction Targets

Pre-Work

- A. Identify technical expertise and who should be involved in discussions. We anticipate you will reach out to technical experts in the state and federal agencies and other caucuses as needed to get the expertise necessary to refine/update strategies and near-term actions. For example, the update to strategies and actions related to invasive species will involve some consultation with the biodiversity council; the update to strategies related to toxics will involve consultation with the appropriate experts at Ecology.

Please be sure to keep the Action Agenda Team and state agency leads in the loop on your communications within each agency. We need to be very sensitive to agency concerns over too many requests for information. Please work with the Action Agenda Team to help us understand which technical experts in which agencies you might want to contact so we can help coordinate things from an overall agency-by-agency perspective. If you're not sure who to contact the Action Agenda team will be able to help.

B. Assemble and Distribute Needed Information. The Action Agenda team will provide you with the following information:

- Puget Sound conceptual model (in Miradi) and any other science-based information
- Strategies and actions from the 2008/2009 Action Agenda
- Relevant comments received during the 2008/2009 process and since then
- Any updates on Action status
- Puget Sound climate information and any other relevant cross-cutting information
- Available information from LIOs on their relevant priorities/actions
- Relevant information from the Puget Sound Science Update
- Relevant LO-related information, workplan bins, logic models, other
- Results chains/conceptual models if they exist from 2008/2009 work
- Preliminary conceptual models from the interdisciplinary teams working on pressure-reduction targets and related strategies

Step 1: With your technical experts, update/refine Strategies by July 15 (may be done in concert with NTA work, below).

A. Check against existing information.

- Review the Puget Sound conceptual model, the climate change information and other relevant science information. Record any observations or ideas about implications for the strategies and actions at issue. If you are able, do this in Miradi.
- Review the existing strategies and actions, status report(s), and the comments from 2008. Record (in Miradi if you are able) your observations about updates/refinements to consider based on the conceptual model or other information and, and strengths/weaknesses of the current approaches.
- Review relevant actions and priorities from LIOs and relevant logic models or other information from the Lead Organization work and incorporate into your thinking and into your Miradi model, if you have one.
- Review the ongoing program/actions information and ensure that relevant ongoing programs/actions are included in your contributing factors and incorporate into your thinking and into your Miradi model, if you have one. In general, ongoing programs that need to continue to protect/recover the health of Puget Sound should be addressed as contributing factors. The exceptions are: (1) when there is a major programmatic event coming up in the next two years that should be addressed with a near-term action; and (2) when a program looks as if it is at risk of not continuing. In these cases, near-term actions should establish what must be accomplished to continue to protect/recover the health of Puget Sound. Note that if a program is at risk of not continuing, the near-term action might address protection of the program, or reform of the program, or might establish another way to make the contribution to Puget Sound health/recovery that the program represents.

B. Consider at what points in the conceptual model you will intervene and where you will not. In some cases, the most obvious intervention point, or point where you can effect the most change (i.e., reduce the

pressure), is at the direct pressure itself. In other cases, you might get more leverage if you develop strategies and actions that address contributing factors, or indirect pressures and opportunities affecting the direct pressure. For example, if the direct pressure is “pollutants introduced to the Sound,” some of the most effective places to intervene might not be at the point where the pollutant enters the Sound, but rather upstream in the chain of contributing factors at the original source of the pollutant.

Step 2: With your technical experts, identify new strategies and sub-strategies and/or refinements to the existing strategies and sub-strategies by July 15.

A. Brainstorm new strategies and sub-strategies and/or refinements to the existing strategies and sub-strategies from 2008/2009. A strategy is a specific area of focus within one of the Action Agenda priorities. For example: “Prevent pollutants from being introduced into Puget Sound ecosystem to decrease loadings of toxics, nutrients, and pathogens.” A sub-strategy is a collection of actions that work to support a strategy. For example: “Implement targeted air emission and source control programs for land-based vehicles, marine vessels, and air transportation.”

A good strategy is: **linked**, meaning it directly affects one or more critical factors; **focused**, meaning it outlines specific courses of action to be carried out; **feasible**, meaning it is accomplishable in light of resources and constraints; and **appropriate**, meaning it is acceptable to and falling within the cultural, social and biological norms of the region.

In addition to brainstorming new strategies, be sure to consider the priorities that have come forward from the LIOs in this work. Sometimes the strategy and sub-strategy brainstorming will identify ideas that are actually near-term actions; keep track of these so you can consider them when you identify actions later in the process.

Be sure to include, where appropriate:

- Achievement of relevant targets/target milestones from the 2011 target setting work
- Public outreach/social strategies
- Specific collaboration needed among partners: Canada, West Coast, etc.
- Specific funding mechanisms related to this strategy
- Scientific needs to advance the strategy and help make more informed decisions in the future (e.g., effectiveness monitoring).
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B. Asses the likely effectiveness of your candidate strategies and sub-strategies. The likely effectiveness of strategies is related to the potential impact and the feasibility of the strategies. Rating of these two aspects of your strategies will lead you to an effectiveness rating - ranging from Very Effective to Not Effective - that can be used to rank your strategies.

Assess **potential impacts** by considering whether the strategy will lead to the changes/outcomes you wish to see (i.e. reduction of your pressure). This considers both the probability of a positive impact and the likely magnitude of the change. In Miradi (if you are using it) rate your candidate strategies as follows:

- **Very High:** The strategy is very likely to completely mitigate a pressure or restore a target.
- **High:** The strategy is likely to help mitigate a pressure or restore a target.
- **Medium:** The strategy could possibly help mitigate a pressure or restore a target.
- **Low:** The strategy will probably not contribute to meaningful pressure mitigation or target restoration.

Assess **Feasibility** by considering whether the strategy can be implemented within likely time, financial, staffing, ethical, and other constraints.

- **Very High:** The strategy is ethically, technically, and financially feasible.
- **High:** The strategy is ethically and technically feasible, but may require some additional financial resources
- **Medium:** The strategy is ethically feasible, but either technically OR financially difficult without substantial additional resources.
- **Low:** The strategy is not ethically, technically, or financially feasible.

C. Assess science gaps. Consider whether there are places where lack of scientific information prevents or significantly reduces your confidence in a decision about intervention, the details of a strategy, sub-strategy or action, or where additional scientific information would have you make better policy decisions in the future.

D. Carry forward strategies and sub-strategies that have high ratings, and put them in SECTION 1 of the template.

1. Describe your strategy and sub-strategies. Write a short paragraph describing your strategy and sub-strategies. This should address the goals and anticipated results of the strategy and why it is important to Puget Sound health and recovery. It should briefly describe how the strategy and sub-strategies were identified, including key elements of the conceptual model, and it should list any relevant implementation considerations for the strategy and sub-strategies, for example, sequencing or geographic priorities. If the introductory text from 2008 still works as the explanatory text, please let us know and we will import it.
2. List your strategies and sub-strategies and put them in SECTION 1 of the template. Keep the language of strategies and sub-strategies clear, simple, and direct.
3. Check strategy/sub-strategy to target relationships. Also in SECTION 1 of the template, record any additional targets (beyond the primary non pressure reduction target you are working on) your strategies and sub-strategies contribute most towards. The strategy/target crosswalk provided by the Action Agenda team is a starting place for this work.

4. Record any additional relevant details for sub-strategies. Also in SECTION 1 of the template, record some additional detail at the sub-strategy level, including: how each sub-strategy helps to advance the overall strategy; major related ongoing programs that must continue for the sub-strategy to work (use the ongoing programs you identified when you created the conceptual model to inform this); and major funding mechanisms and sources. If it is more appropriate to record this detail at the strategy level, it is fine to do so.

Step 3: With your technical experts, identify draft near-term actions by July 15.

A. Identify near-term actions. Near-term actions define the activities that are intended to take place in a two-year window. The Action Agenda will include both Sound-wide and Local near-term actions. The local actions will come from the priorities and work of the LIOs. The Sound-wide actions may be drawn from the LIO's ideas or flow from the conceptual model(s) and results-chain work (if available), the strategy and sub-strategy brainstorming, or simply be refinements of actions identified as part of the 2008/2009 work. Compile all the ideas for near-term actions. Near-term actions should be new activities, high-profile activities, and large-scale activities. For longer-term projects, the near-term action should be the next step(s) on the critical path for the two-year window. We are planning on about 250 near-term actions, total, in the 2011 Action Agenda. Look across your ideas for near-term actions and identify any gaps; fill gaps as appropriate or note them so they can be carried forward as part of the context that will be provided in the narrative discussion in the Action Agenda. Please note the source of your near-term actions as appropriate, for example, if an action is a logical continuation or next step from something started under the 2008/2009 Action Agenda or if it is drawn from a technical/expert analysis or recommendations, please note.

B. Prioritize near-term actions. Depending on the number of near-term actions identified, we will prioritize actions on a Sound-wide and/or local basis where appropriate. Use the same process outlined above for strategies in section 3C, to rate near-term actions for their likely effectiveness based on their *Potential Impacts and Feasibility*.

C. Specify milestones. Ensure that each near-term action has a milestone associated with it. A milestone is a performance measure related to the near-term actions. For some NTA, it may be as simple as complete or not complete. For other NTA the milestone may be an increment of progress that should be achieved in the two-year Action Agenda window. Ensure that each NTA is clearly written and includes what (specifically) the action is, who will be responsible for the action, and where the action will take place (if appropriate). Record any cost estimate for the action.

D. Describe any additional investments beyond your near-term actions that should be considered. Write a short paragraph on any additional investment priorities or considerations that go beyond the near-term actions. This might address criteria to consider, geographic considerations, or pending scientific and technical work that might create new opportunities or refine priorities. It is meant to give some direction to other funding sources. Record this paragraph in SECTION 2 of the template.

Step 4: Describe changes from the 2008 Action Agenda & Identify Questions for Public Review.

Please write a short paragraph on why and how your proposed, revised or new strategies, sub-strategies, and near-term actions are different from the 2008 Action Agenda. For example, there might be more clarity and specificity based on the conceptual model; new regional importance; or new information such as completion of scientific, technical, or policy work since 2008, based on implementation results to date. This is meant to address the entire strategy area (e.g., the strategy, sub-strategies, and near-term actions as a package) and is in addition to the information on the relationship of individual near-term actions to the 2008 Action Agenda. Record this paragraph in SECTION 3 of the template. Please also identify any questions or issues that should be highlighted for public review and record them in SECTION 4 of the template.

Step 5: Assist in assessing and incorporating public feedback in September and October.

This will involve review of comments, refinements to strategies, sub-strategies, and near-term actions and possible discussion with the Cross-Partnership Strategic Advisory Groups.