

# CHESAPEAKE BAY

## ACCOUNTABILITY AND RECOVERY ACT OF 2011

H.R. 258

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## Table of Contents

1 Executive Summary.....	2
2 Chesapeake Bay: Issue Background.....	5
3 Existing Program Structure .....	8
3.1 Existing Organizations Responsible for Restoration Activities .....	9
3.2 Mandatory Requirements .....	11
4 Bill Implementation Plan.....	12
4.1 Financial Transparency Program Design.....	12
4.2 Adaptive Management Program Design.....	15
4.3 External Consultant .....	16
5 Implementation Timeline .....	17
5.1 Structure .....	17
6 Budget .....	18
6.1 Program Budget by Organizational Unit.....	18
6.2 Program Budget by Activity .....	19
7 Program Management Analysis.....	20
8 Conclusion .....	21
9 Works Cited.....	22
10 Appendices.....	25
Appendix 1: Acronyms and Key Terms .....	25
Appendix 2: Chesapeake Bay H.R. 258 Bill Text.....	26
Appendix 3: Line Item Budget .....	32
Appendix 4: Performance Management Summary Chart .....	33
Appendix 5: Master Calendar for Year 1 Implementation (2013) .....	34
Appendix 6: Description of Master Calendar Activities.....	35

## 1. Executive Summary

The Chesapeake Bay watershed covers six states, and stretches across almost 200 miles of the United States, from New York in the north to Virginia in the south. This complex watershed is home to over 17 million people and over 3,000 species of flora and fauna. The Chesapeake is the largest estuary in the country, and is an economic engine valued at over one trillion dollars.

The name Chesapeake is derived from the native Algonquin word *Chesepiooc* meaning “Great Shellfish Bay” or “Big River” (Ernst, 2003). Both names are fitting: the Bay is comprised of 11,684 miles of shoreline, and is home to a large seafood industry. Chesapeake oysters have been enjoyed for centuries by Native Americans and later European settlers, continuing until today. Currently, the annual oyster harvest has decreased 98 percent from 35 million pounds in the 1950s to less than 600,000 pounds in 2003 (Ernst, 2003). The decrease in oyster yield is only one example of the negative effects of overfishing, poor water quality, and loss of wetlands. Environmental degradation is further exacerbated by growing urban development and a lack of stringent regulations on farms, factories, developers, and other polluters.

Many organizations at the federal, state, and local levels seek to address these issues. Local organizations such as the Chesapeake Bay Program (CBP), formed almost 30 years ago, have been integral in taking action with stakeholder participation. The Chesapeake Bay Program is a regional-level partnership between Maryland, Virginia, Pennsylvania, and Washington DC stakeholders. Furthermore, the restoration of the Chesapeake Bay is a national priority: the Environmental Protection Agency’s Chesapeake Bay budget has steadily grown in the past few years— from \$31 million in 2009 and \$58 million in 2012 (DeBell 2012). President Obama’s proposed federal budget for 2013 will allocate an additional \$15 million to Chesapeake Bay activities despite an overall cut in EPA funding (AP 2012). Even with such funding, there are shortcomings in restoration activities due to the multilayered nature of the issues being addressed. However, with coordinated action, there is enormous potential for restoration efforts to improve the health of the Bay.

Federal legislative action has the ability to address environmental degradation, ecosystem restoration, and management of government spending in the Chesapeake. The Chesapeake Bay Accountability and Recovery Act of 2011, H.R. 258, is the legislative solution. The three main components of the Bill seek to address restoration of the Bay’s health through more appropriate and ultimately successful means of fiscal, scientific, and accountability management throughout the numerous organizations engaged in the Bay’s revitalization. The three key components are:

1. The creation of an annual Financial Transparency Report
2. The development and implementation of an Adaptive Management Plan, and
3. The appointment of an Independent Evaluator.

The existing management of restoration activities will be expanded in an organized, coordinated, and efficient manner. More specifically, the Financial Transparency Report will monitor and report past,

current, and future spending in order to streamline expenditures. The Adaptive Management Plan (AMP) will be a cyclical process of modifying restoration activities based on lessons learned from past experience, so that performance can continually improve. Lastly, the Independent Evaluator (IE) will provide a third-party perspective on the management process and how it may be improved.

This report shall serve as a draft implementation plan for the Bill's first year. The plan is subject to change in response to feedback as key milestones are reached. The first-year implementation strategy for each of the three key components is guided by a master calendar that provides a basic timeline for the entire program. The two units for the program implementation are the Financial Transparency Committee and the Adaptive Management Plan Task Force. These two units are charged with mutually exclusive tasks and do not specifically interact. The use of an Independent Evaluator will be delayed until ample time has been allotted for the restoration efforts to take effect. The implementation of the Bill will transpire as follows:

**Financial Transparency Report Committee:** A team consisting of multiple government agency officials will be responsible for completion of the Financial Report. The Report:

- Is designed to improve transparency in the reporting of financial data and increase the accountability of all agencies involved in funding restoration efforts.
- Will be compiled by the U.S. Environmental Protection Agency (EPA), reported to the Office of Management and Budget (OMB), and then submitted by the OMB to Congress on an annual basis.
- Will be compiled throughout the year and finalized in the last two months of the calendar year.

**Adaptive Management Plan Task Force:** The Adaptive Management Task Force will be responsible for implementing an adaptive management framework. The Adaptive Management Plan:

- Is based on the existing organizational structure of the Chesapeake Bay Program.
- Will integrate the newly created positions of Leader, Coordinator, an external consultant specializing in adaptive management, and support staff.
- Will be developed by the Adaptive Management Plan Task Force during the year, and be implemented beginning in the last three months of the calendar year.

**Independent Evaluator:** The Independent Evaluator will be omitted during the first year of Bill implementation. Following the first year, the use of the Independent Evaluator will aid in the measurement and improvement of the Adaptive Management Plan, and restoration activities as a whole.

A comprehensive performance management system will be used to review the management processes of the Financial Transparency Report Committee and the Adaptive Management Plan Task Force. This management system is designed with measurement, collection, reporting and feedback in mind. Each management process will be measured by their inputs, outputs, and the resulting impact. The

establishment of data collection and reporting feedback mechanisms ensures that qualitative and quantitative information is incorporated into future restoration management plans.

The estimated budget for first year implementation of the program is approximately \$825,000. The budget is divided between the Financial Transparency Report Committee and the Adaptive Management Task Force units. Main expenses include staff salaries, workshops, and various administrative expenses vital to operations.

The program implementation design is a collaborative attempt to streamline the efforts of many stakeholders. The design provides specific measurable objectives and a designated timeframe for completion of the funded restoration activities that aim to “protect, conserve, or restore living resources, habitat, water resources, or water quality of the” Chesapeake Bay watershed (H.R. 258 Bill Text 2011). The success of this program will not only lead to a more sustainable and healthy Bay, but will also act as a model for future Adaptive Management programs.

## 2. Chesapeake Bay: Issue Background

The Chesapeake Bay watershed is an expansive and extremely diverse area. The diversity of its residents and its natural resources make management of environmentally-detrimental activities a growing challenge. As environmental degradation continues, the importance of restoration activities also grows. Government, non-profit organizations, academia, and private companies all play a crucial role in reversing environmental degradation. However, the number of involved parties makes coordination of restoration activities a complex and challenging task. The Chesapeake Bay Accountability and Recovery Act of 2011 will mitigate this challenge by:

- Continuously evaluating the coordination and management of restoration efforts
- Adapting restoration efforts based on past performance
- Increasing project transparency for stakeholders, and
- Improving the financial accountability of all restoration activities.



Over 17 million people live in the Chesapeake Bay watershed, which covers six states (Virginia, Maryland, Pennsylvania, Delaware, West Virginia, New York) and Washington DC. The Chesapeake Bay is the largest estuary in the United States, and second largest in the world. The large size is only one reason for national interest in the Bay's restoration. The Bay is home to a commercial seafood industry that produces over 500 million pounds of seafood each year (CBP, 2012d). The Bay economy also consists of large agricultural operations, industrial factories, and urban development—each providing important services to consumers, as well as jobs for Bay residents. The value of the Bay can also be assessed in non-economic terms. Recreational opportunities such as hiking, fishing, and swimming, as well as the natural beauty of the Bay, are difficult to capture in monetary terms.

The need for restoration activities is widely acknowledged among residents and politicians. The creation of the Chesapeake Bay Program (a partnership between concerned parties) in 1983 was in direct response to this awareness. However, implementation of restoration activities continues to be a challenge. The multiple geographic regions involved make coordination of restoration efforts difficult. Furthermore, the relative size, budgets, and political power of involved stakeholders complicates restoration activity plans. Lastly, the problems causing the deterioration of the Bay's health, their scientific solutions, and our understanding of these issues are continuously evolving.

The Chesapeake Bay Accountability and Recovery Act of 2011 (H.R. 258) addresses the four main issues of water quality, habitat, biodiversity, and water resources. Water quality and water resources are threatened by runoff pollution from agriculture and industry, over-fishing, and the pressures of a

growing residential population. Habitat is threatened by commercial development of valuable wetlands systems, making the estuary unsuitable for wildlife native to the Bay.

H.R. 258 is the mechanism needed to coordinate stakeholders, organize funding, and improve restoration implementation strategies to ensure a better future for the Bay. The complete text of the Bill is attached as Appendix 2, but may be outlined in three sections:

### **The Financial Transparency Report**

The annual Financial Transparency Report will monitor and report past, current, and future spending in order to streamline expenditures. The Office of Management and Budget (OMB) is responsible for the development, execution, management and coordination of Federal program budgets. The OMB is required to:

- Report all federal and state expenditures for restoration activities in the coming year and for two years prior.
- Account for any funds received and utilized by all agencies for proposed restoration activities
- Consult with Chesapeake Bay stakeholders.
- Prepare and submit an annual report to Congress within 30 days of the President's annual budget submission (CBP 2012).

### **The Adaptive Management Plan**

The Adaptive Management Plan is a cyclical process of modifying restoration activities based on the outcomes of previously employed policies and practices. The U.S. Environmental Protection Agency (EPA), in consultation with federal and state agencies, is required to develop and implement the Adaptive Management Plan for restoration activities. The EPA is also required to:

- Update the Adaptive Management Plan every two years with a design to include "specific and measurable objectives to improve water quality, habitat, and fisheries" (H.R. 258 Bill Text 2011).
- Include the Adaptive Management Plan in the Annual Action Plan and Annual Progress Report required by Executive Order 13508 (President Obama's strategy for protecting and restoring the Chesapeake Bay watershed).
- Submit an annual report on the implementation of the Adaptive Management Plan to Congress.
- Include a process for stakeholder participation, prioritization of restoration efforts, and modification of restoration activities that are not achieving their goals.

### **The Independent Evaluator**

The Independent Evaluator provides a third-party perspective to the adaptive management process. The EPA will appoint the Independent Evaluator from among four nominations by the Chesapeake Executive Council. The Chesapeake Executive Council consists of the governors of Maryland,

Pennsylvania and Virginia, the EPA administrator, the mayor of the District of Columbia, and the chair of the Chesapeake Bay Commission (a legislative body serving Maryland, Pennsylvania, and Virginia). The Independent Evaluator is required to:

- Review and report on restoration efforts to ensure that progress is being made.
- Ensure the effectiveness of the AMP.
- Submit their findings to Congress every two years.

The three components of the Bill rely on the cooperation of groups across federal and state boundaries. Collaboration between organizations is key for the improvement of the currently existing restoration program management structure.



#### **Executive Order 13508**

Executive Order (EO) 13508 precedes H.R. 258. The EO was signed by President Obama in May 2009 and seeks to strengthen federal leadership of restoration activities in the Chesapeake Bay watershed. The EO addresses shortcomings in restoration efforts in the Bay by improving coordination of implementation strategies, and by reviving federal interest in their success. The Federal Leadership Committee (FLC) is led by the Administrator of the EPA and comprised of senior representatives from the federal Departments of Agriculture, Commerce, Defense, Homeland Security, the Interior, and Transportation, with the mandate “to oversee the development and coordination of programs and activities, including data management and reporting, of agencies participating in and restoration of the Chesapeake Bay” (EO, section 201).

The FLC, in conjunction with the Chesapeake Bay Program, will implement the EO through: the Annual Action Plan, the Annual Progress Report, Independent Evaluation, an Adaptive Management Plan, and greater transparency and integration of federal, state, and local actions through *ChesapeakeStat*. These strategic tools are referred to and incorporated in the Bill Implementation Plan detailed in Section 4.

### 3. Existing Program Structure

The Chesapeake Bay Program (CBP) brings together a number of agencies and organizations to coordinate efforts in restoring the Bay and its rivers. The CBP consists of federal and state agencies, local governments, non-profit organizations and academic institutions. One director and three deputy directors oversee the organization's daily work. Six Goal Implementation Teams (GITs) carry out the restoration activities in the areas of fisheries, habitats, water quality, watersheds, stewardship and partnership (CBP 2012).

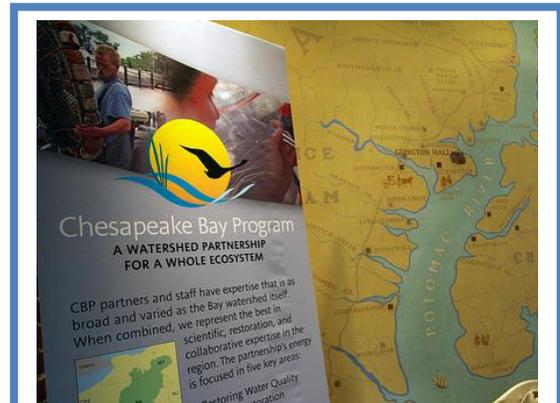
Many of the actions mandated in H.R. 258 are already being carried out in the Chesapeake Bay region. The Bill implementation design works within the pre-existing structure to enhance transparency and accountability of Bay restoration activities. Key agencies currently involved include:

- **The U.S. Environmental Protection Agency**

**(EPA):** The EPA Office for the Chief Financial Officer specifically deals with budget concerns. EPA Region 3, based in Philadelphia, is responsible for restoration activities in the Chesapeake Bay watershed. The Office of Water at the EPA headquarters in Washington D.C. also oversees water-related projects in the Bay (EPA 2012).

- **The Office of Management and Budget's (OMB) Environment Branch:**

The OMB is a part of the Executive Branch, and is responsible for development, execution, management and coordination of federal budgets. The Environmental Branch is located in the Natural Resources Program (OMB 2012) and is the most suitable branch for the preparation of the annual Financial Transparency Report.



Source: CBP

The Chesapeake Bay Program was created in 1983 as a collaborative initiative with support from concerned local and regional citizens together with environmental groups. The Program brings together leaders and experts from a variety of agencies and organizations, and is the backbone of the Bill Implementation Structure.



The CBP partners have developed ChesapeakeStat as “a systematic process within the Partnership of analyzing information and data to continually assess progress towards goals and adapt strategies and tactics when needed” (ChesapeakeStat, 2012b). Information is presented through a public website, with the general goal of promoting improved accountability, coordination, and transparency. Performance information on goals, indicators, strategies and funding is also publicly shared (ChesapeakeStat, 2012b).

- **ChesapeakeStat:**

ChesapeakeStat is a tool within CBP that compiles and analyzes data to assess and adapt progress towards the goals and strategies set forth by the CBP. The website provides information on partner activities and the status of funding (ChesapeakeStat 2012).

### 3.1 Existing Organizations Responsible for Restoration Activities

The EPA is currently the lead agency responsible for the coordination of restoration activities in the Chesapeake Bay, through the CBP. The CBP is a unique interdisciplinary partnership of Chesapeake Bay states, federal and state agencies, academia and nongovernmental organizations, that has led and directed restoration activities since its inception (CBP 2012a). The activities of CBP partners are guided by a number of agreements and policy documents, including Chesapeake 2000 and the Chesapeake Action Plan. Chesapeake 2000 is an agreement designed by the CBP to guide restoration efforts, and assess compliance with goals set. The Chesapeake Action Plan is another program designed to improve the outcome of restoration projects and increase accountability among participants. These efforts are coordinated through the EPA. The CBP's organizational structure, led by its Executive Council and Management Board, includes a number of Committees and Goal Implementation Teams that coordinate restoration activities (CBP 2012a).

#### **Federal Leadership Committee (FLC) & the Independent Evaluator**

The FLC, in collaboration with State agencies, will ensure that an Independent Evaluator periodically reports on progress to meet the goals of the Executive Order. All evaluation reports (including data on practice or system implementation and maintenance funded through agency programs) are made available to the public, through information posted on the internet (EO 2009, Section 206).

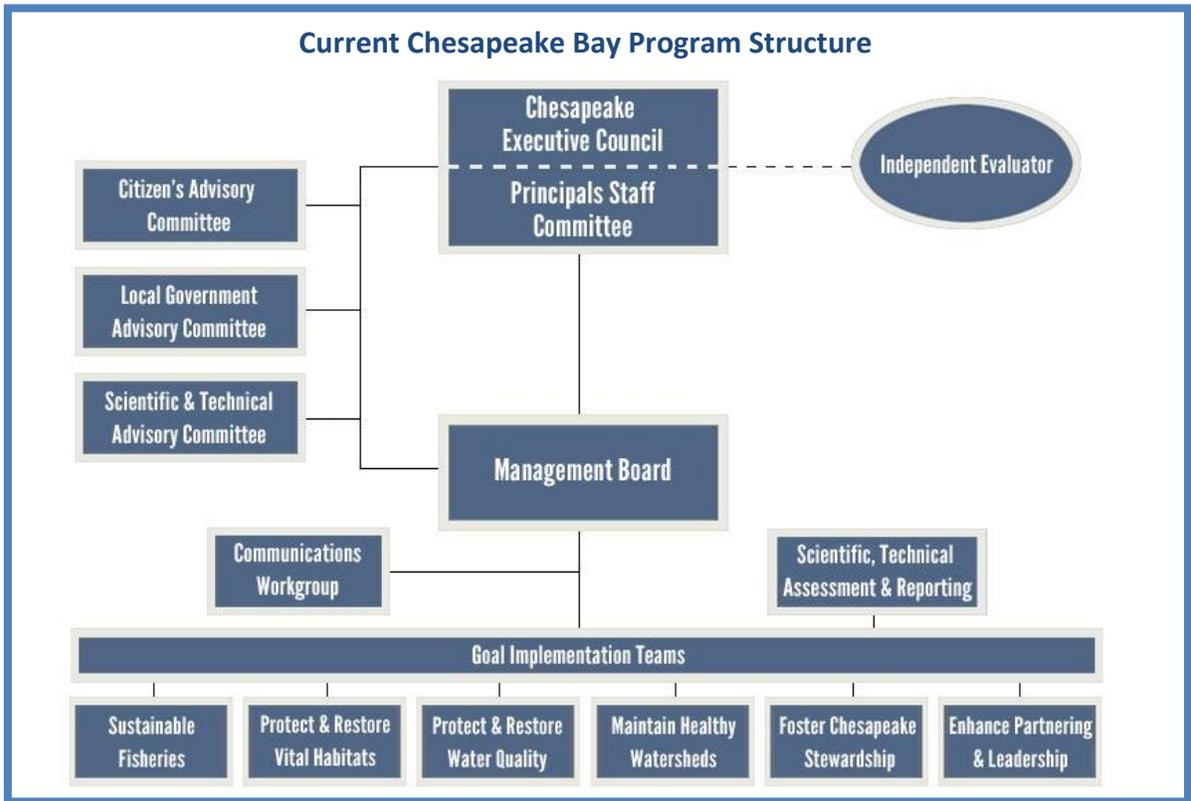


Figure 1: The current organizational structure of the Chesapeake Bay Program. Ground-level work is completed by six Goal Implementation Teams (GITs), located at the bottom of the organizational chart. Oversight is provided by a Management Board. The Chesapeake Executive Council manages all activities.

The CBP also works closely with the Federal Leadership Committee (FLC). Established in 2009, the FLC is responsible for the coordinated implementation of existing programs and activities, and is required to prepare Annual Action Plans and Progress Reports (FLC 2010a) for Congress. The CBP’s Executive Committee and the FLC currently coordinate and integrate their work. Significantly, the CBP has already commenced a process for incorporating adaptive management into its program (CBP 2011a). Between 2009 and 2011, it also engaged an independent evaluator to review certain aspects of the program (CBP 2012c). The EO also includes requirements for the FLC to incorporate adaptive management and independent evaluation. Both the CBP and the FLC are working to improve financial reporting, through the ChesapeakeStat website

#### Annual Action Plan

According to the EO, the FLC is required to publish an annual Action Plan to describe how federal funding proposed in the President’s budget is to be used to protect and restore the Chesapeake Bay during the forthcoming fiscal year. The Action Plan is accompanied by a Progress Report for reviewing “indicators of environmental conditions in the Chesapeake Bay, assessing implementation of the Action Plan during the preceding fiscal year, and recommending steps to improve progress in restoring and protecting the Chesapeake Bay” (EO, Section 205). The 2011 Action Plan designated almost 500 million dollars to Bay restoration activities.

and Annual Action Plans (ChesapeakeStat 2012, FLC 2012b).

Although these efforts are in place, they can be enhanced by the three main components of H.R. 258. These components will formalize and strengthen the existing activities of the CBP and the FLC. While the three components of H.R. 258 are already being undertaken by the CBP and the FLC to some extent, giving the components a legal basis ensures that they are given more rigorous attention, thereby improving accountability and restoration outcomes.

### 3.2 Mandatory Requirements

All actions explicitly contained in H.R. 258 are mandatory. The scope of available discretion is detailed below for each of the three components of H.R. 258.

#### 1. *Financial Transparency Report (FTR)*

- Federal restoration activities must be described if the costs are more than or equal to \$100,000.
- State efforts must be described if costs are more than or equal to \$50,000.
- Discretion is available regarding the process for stakeholder consultation and involvement.
- Discretion is available regarding the structure of the Report, and how much detail is to be included.

#### 2. *Adaptive Management Plan (AMP)*

- Discretion is available regarding the approach required for preparing the AMP.
- Discretion is available regarding the timeframe for implementation of the AMP.

#### 3. *Independent Evaluator (IE)*

The Independent Evaluator is tasked with reviewing the implementation of the Adaptive Management Plan.

- The appointment of the Independent Evaluator will be delayed until ample time has been allowed for the restoration activities to have taken effect (after the first year of program implementation).

## 4. Bill Implementation Plan

The program design is based on the required components of H.R. 258. The goals of improved coordination of restoration management efforts, and an increase in stakeholder participation, will be accomplished through the mandatory tools of the Financial Transparency Report and the Adaptive Management Plan. The program design integrates these tools in a collaborative manner, with a high level of administrative and financial input from the U.S. Environmental Protection Agency (EPA) and the Chesapeake Bay Program (CBP). The leadership of each component is as follows:

- The mechanism for creating the Financial Transparency Report will be coordinated by the EPA and CBP. A new interagency group, the Financial Transparency Committee, will compile information from all agency sources and prepare the report itself. The EPA will utilize already established partnerships with the Bay stakeholders to gather and coordinate information for submittal to the Office of Management and Budget (OMB). The OMB has the final responsibility of approving and submitting the report to Congress as required by the Bill.
- The Adaptive Management Plan (AMP) will be implemented by the EPA, in close partnership with the CBP. Collaboration will significantly strengthen the planning process.

This program design builds upon existing public reporting mechanisms to promote greater accountability. While it places a greater administrative responsibility on the EPA and CBP, the Financial Transparency Report may better reflect the real situation and needs of Chesapeake Bay restoration efforts, leading to better long-term environmental outcomes. In relation to the AMP, the focus on widespread stakeholder engagement makes collaboration between the CBP and both internal and external stakeholders ideal for successful implementation of adaptive management.

### 4.1 Financial Transparency Program Design

Two new organizational units within the Chesapeake Bay Program (CBP) are necessary to realize the full potential of H.R. 258. The units are:

- A Financial Transparency Committee, and
- An Adaptive Management Plan Task Force.

The functional statements and staffing for the two units are presented below.

**Financial Transparency Committee:** H.R. 258 calls for a cross-cut budget to be developed in consultation with stakeholders such as CBP, the Chesapeake Bay Commission (Maryland, Virginia, and Pennsylvania representatives) and all other Chesapeake Bay states. Setting up an interagency committee to develop the annual Financial Transparency Report is therefore a suitable option. Moreover, having related stakeholders involved will increase transparency and accountability through the mandatory reporting of

federal or state expenditures on Chesapeake Bay restoration activities. Such reporting will include any expenditure of over \$50,000 at the state level and over \$100,000 at the federal level. The Financial Transparency Committee will consist of the OMB, EPA, CBP, Chesapeake Bay Commission, and ChesapeakeStat. Data gathering will be carried out mainly by ChesapeakeStat to support the Environment Branch of the OMB, which has a limited capacity due to minimal staffing. Figure 3 describes the process of information incorporation in to the Financial Transparency Report.

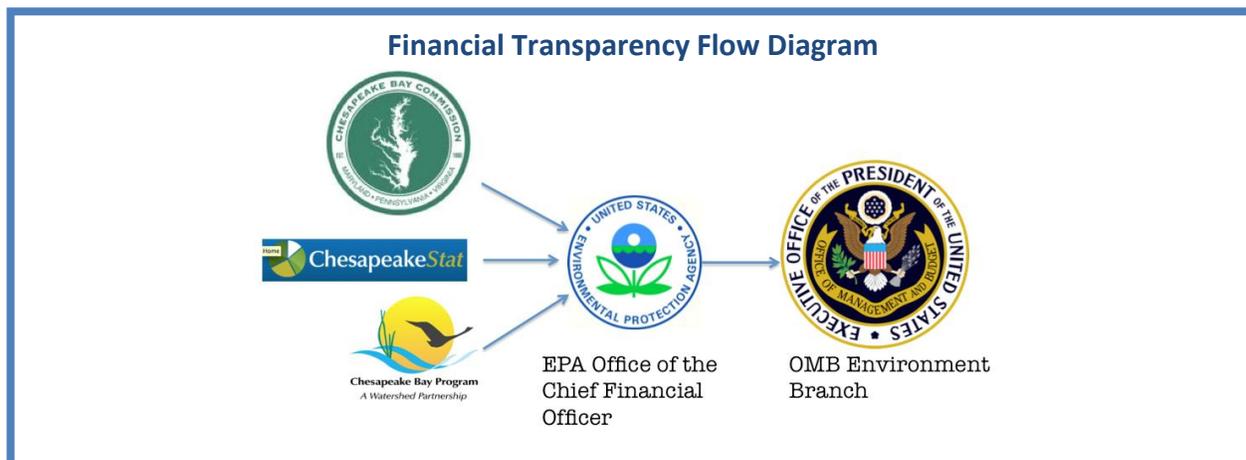


Figure 3: Flow diagram of the Financial Transparency Committee activities. The Chesapeake Bay Commission, ChesapeakeStat, and the Chesapeake Bay Program will deliver data to the EPA. The EPA will then compile the information for the Office of Management and Budget’s preparation of the annual report to Congress.

The Financial Transparency Committee will consist of already existing positions with the exception of the support staff. The job positions, organizational affiliations, job descriptions, and skills needed for each new position are listed below:

- **OMB Coordinator:** Responsibilities include overall coordination and submittal of the annual financial report to Congress. Qualifications include knowledge and experience in financial reporting, as well as excellent analytical, communication and collaboration skills.
- **EPA Office of the Chief Financial Officer Representative:** Responsibilities include providing expert knowledge on the Chesapeake Bay, and contributing to information about EPA’s budget and funding related to Chesapeake Bay restoration activities. Qualifications include knowledge and experience in financial reporting, knowledge of restoration activities, and excellent analytical, communication, and writing skills.
- **Chesapeake Bay Commission Representative:** Responsibilities include providing funding information from the states of Maryland, Virginia and Pennsylvania. Qualifications include familiarity with budget processes and financial reporting, and excellent data analysis, writing and communication skills.

- **Representative from ChesapeakeStat:** Responsibilities include gathering and providing funding data, to be included in quarterly reports for the Financial Transparency Committee. Qualifications include familiarity with budget processes and financial reporting, and excellent data analysis, writing and communication skills
- **Chesapeake Bay Program Representative:** Responsibilities include assisting ChesapeakeStat in data gathering. Qualifications include experience with restoration projects, familiarity with budget processes and financial reporting, and strong data analysis skills.

#### 4.2 Adaptive Management Program Design

**AMP Task Force:** The AMP Task Force will be located within the Chesapeake Bay Program Organizational Structure (see Figure 1). The Task Force will provide improved management and coordination. The Task Force will develop the AMP, drive and streamline adaptive management into CBP restoration activities, and compile the AMP to be submitted to Congress by the end of the first year. The CBP will report to EPA Region 3, who eventually reports to Congress. Addition of the Task Force to the CBP will avoid a full organizational restructuring, which is economically and politically beneficial.

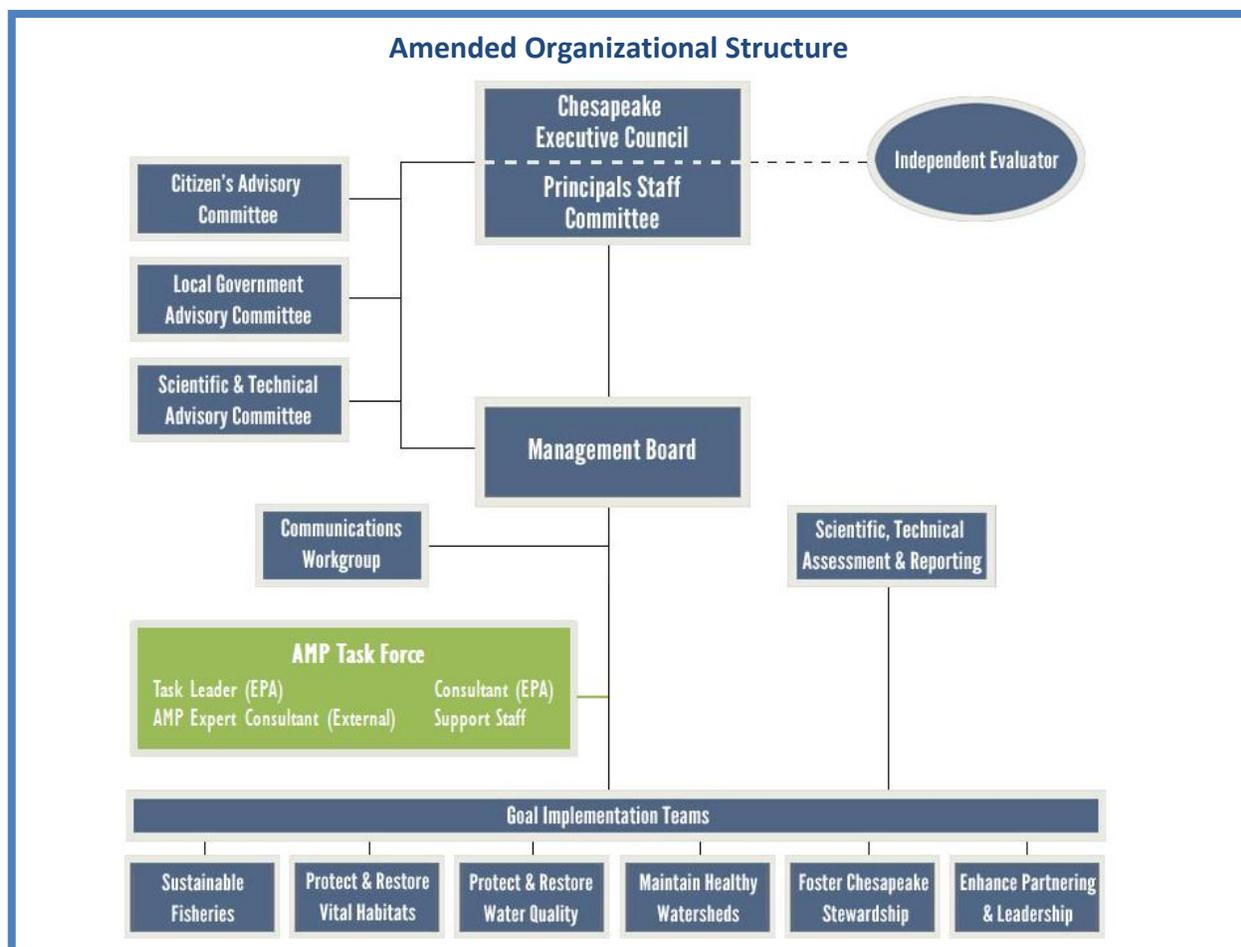


Figure 2: Amendments to the existing organization chart of the Chesapeake Bay Program. The AMP Task Force will be placed above the pre-existing Chesapeake Bay Program Goal Implementation Teams (GITs).

The CBP program was founded as a collaborative initiative, and will be utilized to implement the AMP component of the Bill. The AMP’s collaborative and centralized approach will improve coordination and management of the restoration activities, and bring in a more standardized process and shorter decision-making time.

### Adaptive Management Positions

The two organizational units require new positions, to consist of members already involved in restoration management. The skills and experiences required for each new position are delineated below:

- **The AMP Task Force Leader:** The Leader will be an internal hire from the EPA, who shall devote part of his or her time to this position. Responsibilities include managing the overall work plan, liaising with the Chesapeake Bay Program and the EPA, and compilation of the Annual Report in close collaboration with the Coordinator, Adaptive Management Expert Consultant and Support

Staff. Qualifications include familiarity with the Chesapeake Bay and prior experience with similar restoration projects. Excellent organizational, managerial, and communication, skills are crucial.

- **Coordinator:** The Coordinator will be an internal hire from the EPA, who shall devote part of his or her time to this position. Responsibilities include the development of the AMP, coordination of Goal Implementation Teams (GITs), AMP modification, ensuring an effective and transparent stakeholder process, assisting GITs in prioritizing restoration activities, and preparing quarterly reports to be used for by the Task Force Leader for the final annual report. The Coordinator will also assist the Task Force Leader with compiling the annual report. Qualifications include previous experience coordinating teams and working on restoration projects, and familiarity with the situation in the Chesapeake Bay. Excellent organizational, writing, and analytical skills are crucial.
- **Adaptive Management Expert Consultant (external):** Responsibilities include assisting the Coordinator in development of a clear AMP, conducting trainings for the GITs to ensure a thorough understanding of adaptive management, and providing expert knowledge on adaptive management to the Coordinator for the quarterly and annual report. Qualifications include previous experience with large restoration, projects and knowledge of mainstreaming adaptive management.
- **Support Staff:** Responsibilities include assisting with any administrative work; gathering information from the different GITs for the AMP, and assisting the Coordinator in other administrative work.

#### 4.3 External Consultant

Lastly, an external Adaptive Management Expert Consultant (who is not part of the Chesapeake Bay Commission or the EPA) will support the AMP Task Force in accomplishing its mission. The Consultant will be located in the CBP office in Maryland, and work full-time for the first year of program design implementation. The procurement of the consultant will be carried out through the Indefinite Delivery, Indefinite Quantity (IDIQ) contracting process, which is currently in use by the EPA. The use of an existing contractor within the EPA is another possibility, which would help streamline the process and speed delivery of the service needed (GSA 2012).

## 5. Implementation Timeline

The implementation timeline guides the main activities that will take place during the first year after H.R. 258 is passed in December of 2012. The timeline also designates which units are responsible for achieving the main goals of the program.

### 5.1 Structure

The timeline is divided in to the two main program components: the Adaptive Management Plan and the Financial Transparency Report. As stated previously, the third requirement of the Bill, the Independent Evaluator, will not be included in the first year of the program.

A graphic display of the entire timeline and a detailed description of the activities are available in Appendices 5 and 6. The main activities that will occur during the first year are listed for each and summarized in Table 1. Each event is then divided in to more specific tasks, which were assigned to a responsible unit and given a timeline. Each unit is responsible for giving adequate detail regarding each activity.

	Timeline	Task
<b>Adaptive Management Plan Activities</b>	January to Mid-March	AMP Taskforce Implementation (hiring and training)
	April 2013	Hire external consultant. Define objectives and processes with Goal Implementation Teams (GIT)
	Mid-April 2013	AMP Taskforce and consultant begin defining components of the AMP
	March, June, September, and December 2013	Quarterly reports sent to Chesapeake Bay Commission Leadership Goal Implementation Team
	Late November 2013	Annual Report submitted to Congress by Chesapeake Bay Commission Leadership Goal Implementation Team
<b>Financial Transparency Committee Activities</b>	Mid-March 2013	Define Office of Management and Budget coordinator responsible for committee organization and role communication
	March, June, September, and December 2013	Quarterly financial report of expenditures through ChesapeakeStat
	September to December 2013	Prepare budget for succeeding year
	October to December 2013	Develop financial report of required state and federal expenditures for last two years

*Table 1: Master Calendar Timeline and Task Summary. This table condenses the deadlines and tasks of the program design used to achieve the objectives dictated by the Bill.*

## 6. Budget

The program design budget for implementing this legislation in fiscal year 2013 is approximately \$825,000, which is within the Congressional Budget Office's initial cost estimate of one million dollars annually from 2012-2016 (CBO 2011). See Table 2 for a detailed budgetary analysis.

	AMP Task Force	Financial Transparency Committee	Total	% of Total
Personnel Services	\$466,000	\$102,000	\$568,000	69%
Other than Personnel Services	\$92,000	\$166,000	\$258,000	31%
Total	\$558,000	\$268,000	\$826,000	100%
% of Total	68%	32%	100%	

Table 2: Line-Item Budget Percentage Breakdown. The AMP Task Force will require approximately 68% of the total budget, while 32% of the budget will be appropriated to the Financial Transparency Committee.

The Chesapeake Bay has received increasing funding for restoration activities in the past few years. Such federal budgetary allocations include:

- The EPA's Chesapeake Bay budget has steadily grown in the past few years: \$31 million in 2009, \$50 million in 2010, and \$54 million in 2011 (DeBell 2012). In the President's proposed federal budget for 2013, this program will receive \$15 million in addition to its current 2012 budget of \$58 million, despite an overall cut in EPA funding (AP 2012).
- The Chesapeake Bay Fiscal Year 2011 Action Plan (the first publication of its kind) allocated \$491 million of federal resources to all restoration activities (FLC 2010).

It is these budgets that the program will manage with the additional administrative cost of \$825,000. The AMP Task Force will be integrated within the existing Chesapeake Bay Program, capitalizing on current expenditures. See Appendix 3 for the Line-Item Budget.

### 6.1 Program Budget by Organizational Unit

**AMP Task Force:** For Personnel Services Expenses, the budget was drafted using the General Schedules (GS), the predominant pay scale published by the United States Office of Personnel Management for federal employees. The positions are flexible within two grades. The budget estimation uses the salary of the higher grade category as reference. Additionally, all salaries listed will include a 21.79 percent locality pay adjustment (adjustment that reflects the cost of living in this particular region) for Maryland (OPM 2012), where the CBP is located. Because the GS has remained unaltered for the past three years,

a two percent inflation rate was also budgeted to adjust for possible salary raises in the coming year (Spicer 2012). The budget for external consultants will be \$100 per hour, a common fixed rate used at the EPA (DeBell 2012).

To enhance organization-wide understanding of adaptive management, there will be five workshops within the first year to improve the team’s knowledge of adaptive management.

**Financial Transparency Committee:** The FTC will mainly be comprised of representatives from organizations (CBP, EPA, etc.) already participating in biannual summits. The estimated salary percentage indicates the proportion of time they are expected to devote to the Committee. The salary of the representatives, and of the permanent personnel – the ChesapeakeStat Coordinator and Support Staff – all comply with the GS as explained above. Additional travel stipends will also be available for stakeholder representatives participating in the summits and contributing to the Financial Transparency Report.

### 6.2 Program Budget by Activity

Table 3 organizes budget appropriations by the activity that will accomplish the Bill objectives. The program budget sets provisions for the manpower and resources needed to enact the Bill, and also identifies the units responsible for each activity. The measurement results of each objective and activity will then feedback into the AMP of the entire legislation, necessitating adjustments for the forthcoming years.

Objectives	Activities	Funding %	Responsible Unit
Transparency and Coordination	Encourage Stakeholder Participation	16%	AMP
	Coordinate AMP Implementation	29%	AMP
	Preparing Annual Financial Transparency Report	16%	FTC
Financial Accountability	Preparing Annual Financial Transparency Report	16%	FTC
Performance Measurements	Set Specific & Measurable Objectives for GITs	23%	AMP

*Table 3: Program Budget Breakdown by Objectives and Activities. Transparency and Coordination activities will require 61% of the funding, and will be appropriated to the AMP Task Force and the Financial Transparency Committee. The Financial Accountability objective will receive 16% of funding, to be directed to the Financial Transparency Committee. The Performance Measurement objective will receive 23% of funding, to be directed to the AMP Task Force.*

## 7. Program Management Analysis

The performance management evaluation system, instituted by the Chesapeake Bay Program (CBP), ensures that program quality and efficiency is maximized as restoration management continues to evolve. Agencies will be continuously monitored for performance with three goals in mind:

- Incorporation of stakeholder views in to the management process
- Successful management modification based on Adaptive Management principles
- Inclusion of budget information in the annual Financial Transparency Report.

When the CBP was independently evaluated in 2010, the National Science Foundation concluded that the current plan lacks a formal avenue for stakeholder involvement and transparency. Performance management will create a clear channel of communication between stakeholders and managers. The five Adaptive Management Plan workshops budgeted for in the first year of the Bill's implementation will be the platform for stakeholder feedback. After each of the workshops, the Adaptive Management Plan (AMP) Task Force will administer quantitative surveys to measure stakeholder understanding of the AMP and to track stakeholder-suggested initiatives. The surveys will be collected by the AMP Task Force and reported to the "Enhance Partnering and Leadership" Goal Implementation Team (GIT). The GIT will process the results of the survey and provide summarized feedback to the AMP Task Force. Stakeholder suggestions may be incorporated into new proposals, informing the current AMP system and satisfying the Bill's mandate for stakeholder participation.

In order to monitor the goal of successful AMP implementation in restoration activities, each CBP Goal Implementation Team (GIT) will submit draft proposal objectives to the "Enhance Partnership & Leadership" GIT for review. The "Enhance Partnering & Leadership" GIT will approve, deny or modify proposals to assemble a comprehensive restoration measurement plan. They will compile the reports into a comprehensive plan for submittal to the EPA Administrator. The Administrator will measure progress made on objectives and resubmit the EPA's findings to the most relevant GIT. For example, information regarding a decrease in water turbidity would be submitted to the "Protect and Restore Water Quality" GIT. This will create clear established goals for performance improvement.

Budget reporting feedback will ensure that program finances are used in a responsible fashion. Tracking restoration funds will be the responsibility of the Financial Transparency Committee. The Committee will collect individual (state, municipal, non-profit) budgets and compile them into a comprehensive report of all funds being spent to restore the Chesapeake Bay. The OMB and the EPA will then suggest which programs should be discontinued or modified, and how funds should be redirected. The resulting three-pronged performance management system is summarized in the Performance Management Summary Chart (Appendix 4). Each management process will be measured by their inputs, outputs, and the following impact. The establishment of data collection and reporting feedback mechanisms will help determine which strategies are not cost-effective or managerially efficient.

## **8. Conclusion**

There is a delicate balance to strike between the environmental and economic sustainability of the Chesapeake Bay region. The business, recreational, and ecological assets of the Bay will be preserved for future generations if the Bay is restored to a level of health where it can handle the pollutants and contaminants that enter its waters. The Chesapeake Bay Accountability and Recovery Act of 2011 (H.R. 258) operates under the general principle that existing restoration efforts should be utilized, but need increased transparency and swifter implementation.

The Financial Transparency Committee will contribute to a better understanding of how funds for restoration activities in the Bay are spent and where potential improvements can be made. The work will be absorbed within the organization of existing agencies, minimizing financial costs.

Adaptive management is central to the legislation, and will track progress of goal implementation in order to better guide future efforts. The role of the AMP Task Force is critical for underpinning the maintenance of the collaborative frameworks already in place.

Restoration work is already underway, through various groups such as the Environmental Protection Agency, the Chesapeake Bay Program, and the Chesapeake Bay Commission. H.R. 258 will strengthen current efforts through increased financial transparency, stakeholder involvement, and external evaluation. The outcome will be improved management and implementation of restoration activities, and ultimately, an improvement in the health of the Chesapeake Bay.

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## 10. Appendices

### **Appendix 1: Acronyms and Key Terms**

**Adaptive Management:** A systematic process for continually improving management policies and scientific practices by learning from the outcomes of previously employed policies and practices.

**AMP:** Adaptive Management Plan; The second component of H.R. 258, specifying that adaptive management be implemented to ensure continuous improvement in Chesapeake Bay restoration projects.

**CBP:** Chesapeake Bay Program; A regional partnership that leads and directs Chesapeake Bay restoration and protection activities. Partners include federal and state agencies, local governments, non-profit organizations and academic institutions.

**CBC:** Chesapeake Bay Commission; A tri-state legislative assembly founded in representing Maryland, Pennsylvania and Virginia, created in 1980 to coordinate Bay policy.

**Cross-Cut Budget:** A component of the Financial Transparency Report, which aims to monitor and report past, current and future spending to streamline expenditures.

**Chesapeake 2000:** An agreement designed in 2000 by the CBC and CBP to guide restoration efforts and assess compliance of goals set. The 2010 goals were not met.

**ChesapeakeStat:** An online tool developed by the CBP and FLC to improve transparency of restoration activities, by collecting and providing information on partner activities, funding, and progress towards goals.

**Estuary:** A body of water along a coast that is formed when freshwater from rivers flows into and mixes with saltwater from the ocean.

**EO:** Executive Order 13508; Issued by President Obama in 2009 to improve restoration activities in the Chesapeake Bay through enhanced coordination, and reinvigorated federal leadership of restoration activities in the Bay.

**EPA:** United States Environmental Protection Agency; The federal agency responsible for enforcing ambient air, water, and soil regulatory standards.

**FLC:** Federal Leadership Committee; Composed of representatives from the EPA, the Departments of Agriculture, Commerce, Defense, Homeland Security, Interior and Transportation, and tasked with issuing an annual restoration document ( the Chesapeake Bay Action Plan).

**FTC:** Financial Transparency Committee; The organizational unit responsible for creating the Financial Transparency Report.

**FTR:** Financial Transparency Report; The first component of H.R. 258, which will be submitted to Congress yearly in order to streamline expenditures.

**GIT:** Goal Implementation Team; Six organizational units within the Chesapeake Bay Program responsible for the ground implementation of their restoration activities.

**H.R.:** House Resolution; A Bill originating in the House of Representatives, which is presented to the President for action when approved in identical form by both the House of Representatives and the Senate.

**IE:** Independent Evaluator; The third component of H.R. 258, specifying that an outside party be appointed to provide an unbiased evaluation of restoration progress, and report its findings to Congress.

**OMB:** Office of Management and Budget; The Executive office responsible for budget development, execution, management and coordination. Tasked with submitting the Annual Financial Report to Congress.

## Appendix 2: Chesapeake Bay H.R. 258 Bill Text

Union Calendar No. 161  
112th CONGRESS  
1st Session  
H. R. 258  
[Report No. 112-245, Part I]

To require the Office of Management and Budget to prepare a crosscut budget for restoration activities in the Chesapeake Bay watershed, to require the Environmental Protection Agency to develop and implement an adaptive management plan, and for other purposes.

IN THE HOUSE OF REPRESENTATIVES

January 7, 2011

Mr. WITTMAN introduced the following bill; which was referred to the Committee on Natural Resources, and in addition to the Committee on Transportation and Infrastructure, for a period to be subsequently determined by the Speaker, in each case for consideration of such provisions as fall within the jurisdiction of the committee concerned

October 14, 2011

Additional sponsors: Mr. MORAN, Mr. SARBANES, Mr. RIGELL, Mr. CONNOLLY of Virginia, Mr. GERLACH, Mr. GOODLATTE, and Mr. WOLF

October 14, 2011

Reported from the Committee on Natural Resources with an amendment

October 14, 2011

The Committee on Transportation and Infrastructure discharged; committed to the Committee of the Whole House on the State of the Union and ordered to be printed

[For text of introduced bill, see copy of bill as introduced on January 7, 2011]

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### A BILL

To require the Office of Management and Budget to prepare a crosscut budget for restoration activities in the Chesapeake Bay watershed, to require the Environmental Protection Agency to develop and implement an adaptive management plan, and for other purposes.

*Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,*

**SECTION 1. SHORT TITLE.**

*This Act may be cited as the ‘Chesapeake Bay Accountability and Recovery Act of 2011’.*

**SEC. 2. CHESAPEAKE BAY CROSSCUT BUDGET.**

*(a) Crosscut Budget- The Director, in consultation with the Chesapeake Executive Council, the chief executive of each Chesapeake Bay State, and the Chesapeake Bay Commission, shall submit to Congress a financial report containing*

*(1) an interagency crosscut budget that displays*

*(A) the proposed funding for any Federal restoration activity to be carried out in the succeeding fiscal year, including any planned interagency or intra-agency transfer, for each of the Federal agencies that carry out restoration activities;*

*(B) to the extent that information is available, the estimated funding for any State restoration activity to be carried out in the succeeding fiscal year;*

*(C) all expenditures for Federal restoration activities from the preceding 2 fiscal years, the current fiscal year, and the succeeding fiscal year; and*

*(D) all expenditures, to the extent that information is available, for State restoration activities during the equivalent time period described in subparagraph (C);*

*(2) a detailed accounting of all funds received and obligated by all Federal agencies for restoration activities during the current and preceding fiscal years, including the identification of funds which were transferred to a Chesapeake Bay State for restoration activities;*

*(3) to the extent that information is available, a detailed accounting from each State of all funds received and obligated from a Federal agency for restoration activities during the current and preceding fiscal years; and*

*(4) a description of each of the proposed Federal and State restoration activities to be carried out in the succeeding fiscal year (corresponding to those activities listed in subparagraphs (A) and (B) of paragraph (1)), including the*

*(A) project description;*

*(B) current status of the project;*

*(C) Federal or State statutory or regulatory authority, programs, or responsible agencies;*

*(D) authorization level for appropriations;*

- (E) project timeline, including benchmarks;*
- (F) references to project documents;*
- (G) descriptions of risks and uncertainties of project implementation;*
- (H) adaptive management actions or framework;*
- (I) coordinating entities;*
- (J) funding history;*
- (K) cost-sharing; and*
- (L) alignment with existing Chesapeake Bay Agreement and Chesapeake Executive Council goals and priorities.*

*(b) Minimum Funding Levels- The Director shall only describe restoration activities in the report required under subsection (a) that*

*(1) for Federal restoration activities, have funding amounts greater than or equal to \$100,000; and*

*(2) for State restoration activities, have funding amounts greater than or equal to \$50,000.*

*(c) Deadline- The Director shall submit to Congress the report required by subsection (a) not later than 30 days after the submission by the President of the President's annual budget to Congress.*

*(d) Report- Copies of the financial report required by subsection (a) shall be submitted to the Committees on Appropriations, Natural Resources, Energy and Commerce, and Transportation and Infrastructure of the House of Representatives and the Committees on Appropriations, Environment and Public Works, and Commerce, Science, and Transportation of the Senate.*

*(e) Effective Date- This section shall apply beginning with the first fiscal year after the date of enactment of this Act for which the President submits a budget to Congress.*

### ***SEC. 3. ADAPTIVE MANAGEMENT PLAN.***

*(a) In General- Not later than 1 year after the date of enactment of this Act, the Administrator, in consultation with other Federal and State agencies, shall develop an adaptive management plan for restoration activities in the Chesapeake Bay watershed that includes*

*(1) definition of specific and measurable objectives to improve water quality, habitat, and fisheries;*

*(2) a process for stakeholder participation;*

*(3) monitoring, modeling, experimentation, and other research and evaluation practices;*

*(4) a process for modification of restoration activities that have not attained or will not attain the specific and measurable objectives set forth under paragraph (1); and*

*(5) a process for prioritizing restoration activities and programs to which adaptive management shall be applied.*

*(b) Implementation- The Administrator shall implement the adaptive management plan developed under subsection (a).*

*(c) Updates- The Administrator shall update the adaptive management plan developed under subsection (a) every 2 years.*

*(d) Report to Congress-[Permalink](#)*

*(1) IN GENERAL- Not later than 60 days after the end of a fiscal year, the Administrator shall transmit to Congress an annual report on the implementation of the adaptive management plan required under this section for such fiscal year.*

*(2) CONTENTS- The report required under paragraph (1) shall contain information about the application of adaptive management to restoration activities and programs, including programmatic and project level changes implemented through the process of adaptive management.*

*(3) EFFECTIVE DATE- Paragraph (1) shall apply to the first fiscal year that begins after the date of enactment of this Act.*

*(e) Inclusion of Plan in Annual Action Plan and Annual Progress Report- The Administrator shall ensure that the Annual Action Plan and Annual Progress Report required by section 205 of Executive Order 13508 includes the adaptive management plan outlined in subsection (a).*

#### ***SEC. 4. INDEPENDENT EVALUATOR FOR THE CHESAPEAKE BAY PROGRAM.***

*(a) In General- There shall be an Independent Evaluator for restoration activities in the Chesapeake Bay watershed, who shall review and report on restoration activities and the use of adaptive management in restoration activities, including on such related topics as are suggested by the Chesapeake Executive Council.*

*(b) Appointment*

*(1) IN GENERAL- The Independent Evaluator shall be appointed by the Administrator from among nominees submitted by the Chesapeake Executive Council.*

*(2) NOMINATIONS- The Chesapeake Executive Council may submit to the Administrator 4 nominees for appointment to any vacancy in the office of the Independent Evaluator.*

*(c) Reports- The Independent Evaluator shall submit a report to the Congress every 2 years in the findings and recommendations of reviews under this section.*

*(d) Chesapeake Executive Council- In this section, the term ‘Chesapeake Executive Council’ has the meaning given that term by section 307 of the National Oceanic and Atmospheric Administration Authorization Act of 1992 (Public Law 102-567; 15 U.S.C. 1511d).*

## **SEC. 5. DEFINITIONS.**

*In this Act, the following definitions apply:*

*(1) ADAPTIVE MANAGEMENT- The term ‘adaptive management’ means a type of natural resource management in which project and program decisions are made as part of an ongoing science-based process. Adaptive management involves testing, monitoring, and evaluating applied strategies and incorporating new knowledge into programs and restoration activities that are based on scientific findings and the needs of society. Results are used to modify management policy, strategies, practices, programs, and restoration activities.*

*(2) ADMINISTRATOR- The term ‘Administrator’ means the Administrator of the Environmental Protection Agency.*

*(3) CHESAPEAKE BAY STATE- The term ‘Chesapeake Bay State’ or ‘State’ means the States of Maryland, West Virginia, Delaware, and New York, the Commonwealths of Virginia and Pennsylvania, and the District of Columbia.*

*(4) CHESAPEAKE BAY WATERSHED- The term ‘Chesapeake Bay watershed’ means the Chesapeake Bay and the geographic area, as determined by the Secretary of the Interior, consisting of 36 tributary basins, within the Chesapeake Bay States, through which precipitation drains into the Chesapeake Bay.*

*(5) CHIEF EXECUTIVE- The term ‘chief executive’ means, in the case of a State or Commonwealth, the Governor of each such State or Commonwealth and, in the case of the District of Columbia, the Mayor of the District of Columbia.*

*(6) DIRECTOR- The term ‘Director’ means the Director of the Office of Management and Budget.*

*(7) RESTORATION ACTIVITIES- The term ‘restoration activities’ means any Federal or State programs or projects that directly or indirectly protect, conserve, or restore living resources, habitat, water resources, or water quality in the Chesapeake Bay watershed, including programs or projects that promote responsible land use, stewardship, and community engagement in the Chesapeake Bay watershed. Restoration activities may be categorized as follows:*

*(A) Physical restoration.*

*(B) Planning.*

*(C) Feasibility studies.*

*(D) Scientific research.*

*(E) Monitoring.*

*(F) Education.*

*(G) Infrastructure Development.*

**Appendix 3: Line-Item Budget**

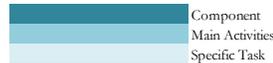
<b>H.R. 258 Chesapeake Bay Accountability and Recovery Act of 2011</b>		
<b><u>Line- item Budget</u></b>		
<b>Fiscal Year 2013</b>		
<b>AMP Task Force</b>		
PS	Management Board/ Chesapeake Bay Executive Council SES V @ 5%	8,872
	Task Leader (EPA) GS-13/14	103,152
	Coordinator (EPA) GS 10/11	61,245
	Support staff GS 9/10 2 full-time, 1 @ 50%	126,550
	Base Salaries	299,819
	2012 2% Inflation Rate Forecast	5,996
	External Consultant 40hr x \$100/hr x 40wk	160,000
	Total PS Expenses	<b>465,816</b>
OTPS	Office Expenses (4.5 Headcounts)	9,000
	Office Space	0
	Travel Expenses (Task Leader& Coordinator:\$10,000 ; Support Staff: \$5,000)	32,500
	5 AMP Workshops	50,000
	Total OTPS Expenses	91,500
	Total AMP Task Force Expense	<b>557,316</b>
<b>CCB Committee</b>		
PS	OMB Representative GS-13/14 @3%	3,095
	EPA Office of the CFO Representative GS-13/14@5%	5,158
	CBP Representative GS-13/14 @5%	5,158
	Chesapeake Bay Commission Representative GS-13/14 @5%	5,158
	ChesapeakeStat Coordinator GS-10/11	55,745
	Support staff GS 9/10 @50%	25,310
	Base Salaries	99,622
	2% Inflation Rate Forecast	1,992
	Total PS Expenses	101,615
OTPS	2 Semi-Annual Summit	100,000
	Office Expenses (1.5 Headcounts)	3,000
	Office Space	0
	Travel Expenses (Coordinator: \$10,000 ; Support Staff: \$5,000)	12,500
	Travel Stipend for Representatives from Other CBP Partners	50,000
	Total OTPS Expenses	165,500
	Total CCB Committee Expense	<b>267,115</b>
<b>Total Program Budget</b>		<b>\$824,431</b>

#### Appendix 4: Performance Management Summary Chart

ACTIVITY	INPUT	PROCESS	IMPACT
<b>Adaptive Management Plan (1)</b>	Quantitative stakeholder satisfaction surveys will be distributed at AMP workshops. Surveys will be reported to the “Enhance Partnering and Leadership” GIT.	The “Enhance Partnering and Leadership” GIT will provide summarized feedback of stakeholder surveys to the AMP Task Force.	The AMP system will be informed by stakeholder feedback. The Bill mandate for stakeholder participation will be met.
<b>Adaptive Management Plan (2)</b>	Each Goal Implementation Team will submit a draft proposal of objectives to the “Enhance Partnering and Leadership” Goal Implementation Team.	The “Enhance Partnering and Leadership” Goal Implementation Team will review and modify all proposals. The CBP Leadership Team will submit the proposals to the EPA Administrator. The EPA will measure progress made on objectives and provide feedback to the relevant Goal Implementation Team.	The EPA will have a mechanism to measure progress made on Goal Implementation Team objectives. A performance measurement system for restoration will exist.
<b>Financial Transparency</b>	All relevant federal, state, academic, and NGO budgets will be compiled by the Financial Transparency Committee.	The report will be delivered to the Executive Office of Management and Budget. Individual budgets will be analyzed for efficiency.	The OMB will eliminate over-funding, and redirect money to under-funded programs.

## Appendix 5: Master Calendar for Year 1 Implementation (2013)

	Unit	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>1. Adaptive Management Plan (AMP)</b>													
<b>1.1. AMP Task Force Implementation</b>													
1.1.1 Define profile of new positions	CBP												
1.1.2 Hire AMP Task Force Leader	CBP and EPA												
1.1.3 AMP Task Force Leader training	CBP												
1.1.4 Hire Coordinator and support staff	AMP TF												
1.1.5 Training of the new Task Force	AMP TF												
<b>1.2. Developing the AMP</b>													
1.2.1 Hire External consultant	AMP TF												
1.2.2 Gather all existing information related to restoration efforts	AMP TF												
1.2.3 Define specific and measurable objectives (water quality, habitat, and fisheries)	AMP TF and Consultant												
1.2.4 Define process for stakeholder participation	AMP TF and Consultant												
1.2.5 Define process of monitoring, modeling, research and evaluation practices	AMP TF and Consultant												
1.2.6 Define process for modifying unsuccessful activities	AMP TF and Consultant												
1.2.7 Define process for prioritizing restoration activities and programs	AMP TF and Consultant												
1.2.8 Share AMP design with stakeholders and with other agencies (workshop)	AMP												
1.2.9 Include stakeholder considerations	AMP TF and Consultant												
1.2.10 Submit final AMP design	AMP TF												
<b>1.3. AMP Implementation</b>													
1.3.1 Goal Implementation Team training	AMP												
1.3.2 Implementation of all AMP components	GIT and AMP												
<b>1.4. Reporting</b>													
1.4.1 Quarterly Report to Leadership GIT	AMP TF												
1.4.2 First annual report to Congress	AMP TF												
1.4.3 Report fiscal year 2013	AMP TF												
<b>1.5. Evaluation</b>													
1.5.1 Annual evaluation	AMP TF and GIT												
1.5.2 Propose and implement changes	AMP TF												
<b>2. Financial Transparency Committee (FTC)</b>													
<b>2.1. Definition of the FTC</b>													
2.1.1 Definition of OMB Coordinator	OMB												
2.1.2 Request to EPA, CBC, CBP for Representative	OMB												
2.1.3 Definition of EPA, CBC, and CBP Representative	EPA, CBC, and CBP												
2.1.4 Hire ChesapeakeStat Representative	ChesapeakeStat and OMB												
2.1.5 First FTC Report submitted	OMB												
<b>2.2. Financial Transparency Reporting</b>													
2.2.1 Gather data of all expenditures	ChesapeakeStat												
2.2.2 Prepare quarterly report	ChesapeakeStat												
2.2.3 Prepare annual report	ChesapeakeStat												
2.2.4 EPA approval	EPA												
2.2.5 OMB approval and submission to congress	OMB												
<b>2.3. FTC Budgeting for the Following Year</b>													
2.3.1 Summit with stakeholders	CBP												
2.3.2 GIT prepare budget per sector	GIT												
2.3.3 Gather final budget	ChesapeakeStat												
2.3.4 EPA approval	EPA												
2.3.5 OMB approval and submission	OMB												



## Appendix 6: Description of Master Calendar Activities

### (1) Adaptive Management Plan Activities

(1.1) AMP Taskforce Implementation: This phase starts in early January and finishes in mid-March. It begins with the hiring process and training of the AMP Task Force Leader, Coordinator and Support Staff. The CBP will lead the hiring process of the Task Force Leader, and will start the hiring process of the other team members. Finally, the AMP Task Force Leader will be responsible for appointing the other team members (Coordinator and Support Staff). The Leader will also organize a week of training for the members to foster a better understanding of the restoration activities and the organizations involved in these actions.

(1.2) Developing the AMP: The Bill mandates that the development of an AMP should not occur later than 12 months after the enactment of the Bill. This means that the AMP should be finalized before December 2013. The implementation timeline finalizes the AMP in September 2013 so that it is finished before the next fiscal year starts. The process starts with hiring an external consultant who will assist with the development of the AMP. During the hiring process, the AMP Task Force will gather all the existing information about the restoration activities of the Goal Implementation Teams (GITs), as well as the efforts of other organizations. In mid-April, the AMP Task Force and consultants will start defining the different components of the AMP. They will define (a) specific and measurable objectives, (b) process of stakeholder participation, (c) process of monitoring, modeling, research and evaluation practices, (d) process of modification of unsuccessful activities, and (e) process of prioritizing restoration activities and programs. This process will take 3.5 months, and when it is finished it will consider the organization of several workshops where the AMP design can be shared with stakeholders and other agencies. After these workshops, it should take one month for the AMP Task Force to consider or discard the proposals of stakeholders and other agencies. The Leader will then distribute the final version of the AMP to the CBP Leadership GIT, the EPA and other stakeholders.

(1.3) AMP Implementation: This includes two tasks. First, the GITs will be trained to properly understand the new AMP process. Training is important because the GITs are the main units implementing the restoration actions of the AMP. Secondly, the implementation of the different activities is considered as one activity in the implementation timeline.

(1.4) Reporting: The reporting process will be carried out through quarterly reports and an annual report. Quarterly reports will be issued the first week of March, June, September and December. These reports will be sent to the CBP Leadership GIT. The Annual Report must be sent to Congress no later than 60 days after the end of a fiscal year (late November). The submission of this report is planned for mid-November.

(1.5) Evaluation: When the annual report is finished, the evaluation process will begin. The process will be four weeks long. After this evaluation process, activities will be analyzed for possible changes and modified if needed.

## (2) Financial Report Activities:

(2.1) Definition of the Financial Report Committee: This will begin with the definition of the OMB Coordinator who will be leading the committee. The OMB will request one nomination each from the EPA, CBP, and CBC for a committee representative. Hiring of the *ChesapeakeStat* Representative, a part-time position, will also occur at this time. In the second week of March, the OMB Coordinator will organize a summit with all the committee members to explain the committee's structure and role.

(2.2) Financial Transparency Report: As with the AMP report, the FTR will also produce quarterly and annual reports. Throughout the entire year, *ChesapeakeStat* will gather information about the expenditures for the different restoration activities. The quarterly reports will be issued in March, June, September and December. The Bill mandates to send an annual financial report including all the expenditures of the last two years no later than 30 days after the submission of the President's annual budget to Congress (approximately early February). The annual report will be developed from the end of the fiscal year (end of September) to the end of the calendar year.

(2.3) Budget Succeeding Year: Together with the cross-cut budget, the FTC has to submit to Congress a budget with all the projected expenditures for the succeeding fiscal year (in this case FY 2014). For the development of this budget, the following activities will be undertaken: (a) two summits with stakeholders to take their opinions in to account (b) GIT preparation of budgets per sector, (c) gathering of all the information in to one budget by *ChesapeakeStat* (d) EPA approval, and finally (e) OMB approval and submission to Congress. This process will take place from September to December.