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**Action Planning Worksheets**

Version 1.7, April 2022

Part 1: Sketch Action Plan Proposal Worksheet

Part 2: Impact Assessment Worksheet

Part 3: Outreach Planning Worksheet

Part 4: Draft Action Plan Worksheet

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# Part 1: Sketch Action Plan Proposal Worksheet

The purpose of Part 1 of this worksheet is to capture basic information about the potential action to inform whether a Draft Action Plan is warranted *at this time*. Fill out as much as you are able based on current information—complete and/or exact answers are not required at this stage. You are asked to make a judgement at the end of Part 1 whether the action is sufficiently flushed out and meets specific screening criteria, and thus, it is timely to develop a Draft Action Plan by completing Parts 2-4. *Note* that sketch proposals that are *not* ripe for further planning now will be set aside and *may* be considered later in the planning process. Sketch proposals that do not become Action Plans in Vision 2032 will be included in an Appendix that compiles potential future actions.

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| **1. Short Title:** *(5-6 words.)* |
| **2. Potential Lead:** *(List org, name, phone, email.)* | **3. Potential Collaborators:** *(List org(s), name(s), phone email(s).)* |
| **4. What type of action is being pursued?** *(Click one or more.)*[ ]  Research/Monitoring [ ]  Outreach [ ]  Capacity Building [ ]  Planning [ ]  Project Implementation [ ]  Project Funding [ ]  Policy[ ]  Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **5. Action Location:** *(Click one. Where does the action take place?)* [ ]  Site. Address:  [ ]  Municipality/Community. Name:  [ ]  Watershed. Name: [ ]  Region [ ]  Not Applicable  | **6. Scale of Potential Impact:** *(Click one or more. Where are the impacts of the action expected to be felt?)* [ ]  Site [ ]  Community [ ]  Municipality [ ]  State [ ]  Watershed [ ]  Region  |
| **7. Short Action Description:** *(Use 4-5 sentences or bullets. Provide an overview of purpose, potential key tasks, and timeline.)* |
| **8. Statement of Need:** *(Use short paragraphs or bullets. What problem(s) will the action try to solve? Why is it important now?)* |
| Part 1: Sketch Action Plan Proposal Worksheet |
| **9. Drivers:** *(Click boxes and/or list requirements or documents.)*Is the action mandated[ ]  Yes [ ]  No; If Yes, explain: Is the action included in other government or NGO plans? [ ]  Yes [ ]  No; If Yes, please list plans:Was the action included in NBEP’s [*2012 CCMP*](https://www.nbep.org/s/NBEP-CCMP-2012.pdf)*?* [ ]  Yes [ ]  No; If Yes, provide the action number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and whether it was [ ]  Completed [ ]  Partially Completed [ ]  Not Addressed |
| **10. Past Work:** *(Click boxes, or use short paragraphs or bullets. What can we learn from past work that has already occurred regarding this action? For example, what studies, data, or other information is in place to inform action development? Provide citations and links.)* |
| **11. Pre-Conditions:** *(Use short paragraph. Is this action ready to be undertaken? Based on answers to questions so far, are all required pre-cursor actions or conditions in place, will be completed prior to initiation of the action, or are included as part of the action?)* |

Part 1: Sketch Action Plan Proposal Worksheet

**12. Potential Tasks & Timeline:** *(Fill out table. Please provide a rough outline of potential tasks that will make up the action. Tasks are the specific and distinct activities needed to accomplish the action. Tasks from initial pre-action research to post-action monitoring and maintenance should be included. Short sentences or notes are appropriate at this stage. Think about which tasks are ready to be pursued and/or must be completed within the short term, and then consider medium or longer-term tasks (S = Short (2023-24), M = Medium (2025-28), and L = Long (2029-32). Further work in Parts 2 and 3 will inform inclusion of a more final list of tasks in Part 4.)*

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| Potential Task Title (up to 5) | Brief Description | Timeline(S, M, L) |
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| 3. |  |  |
| 4. |  |  |
| 5. |  |  |

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| Part 1: Sketch Action Plan Proposal Worksheet |
| **13. Indicators:** *(Click all applicable. Which conditions in* [*NBEP’s State of Our Watershed Report*](https://drive.google.com/file/d/1dgeBNAZ7QofUJDAO7yKG9-uo_642dRvs/view?usp=sharing) *does this action impact?)*[ ]  Temp [ ]  Precipitation [ ]  Sea Level Rise [ ]  Population [ ]  Land Use [ ]  Impervious Surface [ ]  Wastewater Infrastructure [ ]  Nutrient Loading [ ]  Legacy Contaminants [ ]  Emerging Contaminants [ ]  DO [ ]  Chlorophyll [ ]  Water Clarity [ ]  Benthic Habitat [ ]  Seagrasses [ ]  Salt Marsh [ ]  Stream Invertebrates [ ]  Aquatic Life Use General [ ]  Estuarine Fish Use [ ]  Recreation Use [ ]  Open Space [ ]  Marine Beaches [ ]  Shellfishing Areas [ ]  None  |
| **14. Vision 2032 Goals/Objectives** *(Click one or more goals/objectives that this action helps meet based on current information.)* |
| Goal #1: Provide knowledge and capacity for people to act. |
| [ ] 1. Engagement. Increase meaningful engagement and ownership by those most impacted by proposed actions.
 | [ ]  1. Information. Obtain, preserve, and share information to increase understanding and empower informed decisions.
 | [ ]  3. Capacity. Direct funding to entities and people with the expertise and agency to act. |
| Goal #2: Manage water for healthy ecosystems and safe communities. |
| [ ] 4. Nonpoint source pollution. Reduce pollution that runs off the land. | [ ]  5.Point source pollution. Reduce pollution from CSOs, MS4s, and septic. | [ ]  6. Persistent pollutants. Address legacy, emerging, and trash pollution.  | [ ]  7. Flooding. Respond proactively to sea level rise and flooding. | [ ] 8. Water supply. Provide water supply to meet beneficial uses. |
| Goal #3: Restore and protect habitats that support biodiversity and people. |
| [ ]  9. Land use. Advance land use decisions that emphasize public benefits. | [ ] 10. Freshwater living resources. Restore connectivity, function, and resilience of freshwater systems. | [ ] 11. Estuary living resources. Restore and preserve priority estuarine and coastal habitats. | [ ] 12. Public Use. Provide equitable public access to the use and benefits of the commons. |
| **15. Planning Group:** *(Pick most appropriate planning group based on current information.)* [ ]  Capacity for Action [ ]  Water [ ]  Wildlife & Habitat |
| **16. Action Screening Criteria:** *(Click box if the action meets the criterion now or will in the future? If no, offer brief explanation.)*[ ]  a. The action is not already completed or underway (unless it is part of a phased effort and constitutes a distinct/separate action). |
| [ ]  b. The action supports advancement of the [Clean Water Act](https://www.epa.gov/laws-regulations/summary-clean-water-act#:~:text=The%20Clean%20Water%20Act%20(CWA,quality%20standards%20for%20surface%20waters.) and/or [NBEP’s mission](https://www.nbep.org/our-work).  |
| [ ]  c. The action addresses an NBEP Indicator under Question 13 and/or Goal /Objective under Question 14.  |
| [ ]  d. The action will create results that are specific and measurable against metrics. |
| [ ]  e. The action is achievable within 10 years.  |
| [ ]  f. An entity has been identified that can implement and/or coordinate implementation (commitment will be sought in Part 4) |
| **17. Readiness—Based on answers to Questions 1-6, is this action ready to be developed into Draft Action Plan by completing Parts 2-4 at this time?** [ ]  Yes. Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[ ]  No. Please explain: |

# Part 2: Impact Assessment Worksheet

The purpose of Part 2 of this worksheet is to identify potential positive or negative and intended or unintended ***impacts*** of the action and proactive ***revisions*** to the draft action that can maximize benefits and reduce burdens, especially relative to our critical lenses of climate resilience, sustainability, and equity. Revisions may include adding, amending, or removing tasks in Part 4 of this document or modifying precursor or concurrent actions in another Action Plan. Assess the scale of potential impact or “sphere of influence” noted in Part 1.6. Consider what/who is most impacted by the problem the action is addressing and/or by the development and/or installation of the action itself. Look at impacts during and following action, those on/off site, downstream/downwind, or on those that visit an impacted area (e.g., wildlife, tourists).

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| **1. Impacts General:** *(Use bullets. What are the environmental and socioeconomic impacts of this action? Be specific about what natural resource types, geographies, and/or people have been most negatively impacted by the problem this action would address and/or would benefit most from work under this action? Consider historic through future impacts. Are there unintended consequences of the action to capture?)*  |
| Environmental Impacts | Socioeconomic Impacts |
| **2. Revisions General:***(Use bullets. What “big picture” revisions could help maximize net benefits to those most impacted by the problem and this action noted above? Questions specific to each critical lens are provided below.)* |
| Part 2: Impact Assessment Worksheet |
| **3. Climate Resilience:** *(Use bullets that link potential impact and revision to address it. What revisions could help increase environmental and social benefits and/or reduce burdens/vulnerability relative to the projected consequences of climate change? Will the area fall in a STORMTOOLS flood zone by 2050? (*[*link*](https://nbep.maps.arcgis.com/apps/webappviewer/index.html?id=712006b5ccd3496b8c09e6fa940005ed)*). For example, is the location or sphere of influence of the action going to be negated by future sea level rise, flooding, or higher temperatures?)* |
| **4. Sustainability:** *(Use bullets that link potential impact and revision to address it. What revisions could help maximize best use of limited natural and human resources, delivery of ecosystem services, and make the action more self-sustaining in the face of time and change. For example, is a new restoration effort in the best use of the commons and will it be sufficiently self-sustaining over time? Is permanent protection of a land parcel support local ecological and socioeconomic goals? Are maintenance procedures in place in funded?).* |
| **5. Equity and Environmental Justice:** *(Use bullets that link potential impact and revision to address it. What revisions could help maximize diversity, equity, inclusion, or justice around this action? For example, ensuring community capacity to play a leadership role in the design and implementation of the action, taking proactive and intentional action to reduce burdens to those most impacted by the problem targeted and ensuring equitable benefits moving forward. Some questions to consider. Does the action take place or impact an EJ Priority Area (*[*link*](https://nbep.maps.arcgis.com/apps/webappviewer/index.html?id=d81f0bd548574c71a956daf662975341)*) or others that are underserved? What indigenous communities or people were historically or are currently present at the project location or impacted by the project?)* |

# Part 3: Outreach Planning Worksheet

All Action Plans must involve “interested parties” in its development OR a process for including them must be built into the action. The purpose of Part 3 of this worksheet is to help achieve this requirement by identifying interested parties and why, how, and when they should be engaged in plan development. Interested parties may include formal institutions, indigenous nations, demographic sectors, or individuals. They can be referred to by category or name at this stage. Think beyond those traditionally engaged to all those potentially affected by the impacts noted in Part 2, especially underserved communities. Also determine whether an outreach-related task or other support (e.g., capacity-building, funding) should be built into the action.

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| **1. Outreach Activity During Action Plan Development:** *(Fill out table.)* |
| Interested Party | Purpose for Engaging Them | Information “In” *(What you need to know from the interested party)* | Information “Out” *(What you need to share with the interested party)* | Type of Outreach Activity | Lead Messenger | Timing |
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| **2. Outreach After Action Plan is Complete:** *(Use a short paragraph of bullets. Provide some initial insights about appropriate audiences and connected activities that may be useful once the Action Plan is complete.)* |

# Part 4: Draft Action Plan Worksheet

The purpose of Part 4 of this worksheet is to compile/respond to information collected in Parts 1-3 and provide additional specifics to guide development of the Final Action Plan to be included in Vision 2032. This information is included in a spreadsheet to offer adequate space to provide requested information and allow for sorting, prioritization, and other analysis to aid creation of the final Vision 2032 document.

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| **Vision 2032 Framework** *(List the goal, objective, and Planning Group that best suits this action.)***Goal: Objective: Planning Group:** |
| **Action Title:**  |
| **Action Abstract:** *(Provide a <500-word summary of the action that rolls up the action description, need, and other salient information from Parts 1-3 of this worksheet.)* |
| **Screening Criteria:** *(Click the box if the action meets the criteria now or will in before or during the action based on current information.)*[ ]  1. Not already completed or underway [ ]  2. Supports the Clean Water Act and/or NBEP’s mission. [ ]  3. Addresses NBEP Indicator and/or Vision 2032 Goal/Objective. [ ]  4. Results will be specific and measurable. [ ]  5. Achievable within 10 years. [ ]  6. Entity has committed to lead. |
| **Task(s)***(Use sentences. Tasks from Part 1.12 revised based on responses to questions in Part 2 and 3. If there is only a single action/task, provide more information under 1 below.)* | **Task Type***(List type per Part 1.4.)* | **Location***(List location per Part 1.5.)* | **Scale***(List per Part 1.6.)* | **Responsible Party***(Entity that has committed to lead action.)* | **Collaborators***(Key entities engaged or supporting the action)* | **Critical Lenses** *(Click if yes. Was the task created/amended to address these critical lenses per information gathered in Parts 2 and 3?)* | **Inputs** *(Use bullet. List inputs [or links to information] needed to implement and track progress on the task [e.g., data, plan, capacity, outreach])* | **Outputs***(Use bullets. List expected outputs. Apply SMART concepts)* | **Outcomes***(Use bullets. List desired future condition(s) resulting from the action. How are things ecologically and/or socioeconomically better?)* | **Cost** *(Estimate based on current data.)* | **Funding***(List possible sources.)* | **Complementary****Actions*****(****Note other actions that should be implemented with this action to sustain outcomes long-term?)* | **Notes***(Provide any additional information, notes, or references that can inform the Final Action Plan.)* |
| **Climate** | **Sustainability** | **Equity** |
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