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**Action Planning Worksheets**

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Part 1: Sketch Action Plan Worksheet

Part 2: Task Worksheet

Part 3: Impact Assessment Worksheet

Part 4: Outreach Planning Worksheet

Part 5: Draft Action Plan Template

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Part 1: Sketch Action Plan 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 2-5. *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 organization.)* | | | | | | **3. Potential Collaborators:** *(List organization(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 will the action take place?)*  Site. Address:  Neighborhood. Name:  Municipality. Name:  Watershed. Name:  State  Study Area  Not Applicable | | | | | | | **6. Scale of Potential Impact:** *(Click one or more. Where are the impacts of the action expected to be felt?)*  Site  Neighborhood  Municipality  Watershed  State  Study Area | | | | |
| **7. Short Action Description:** *(Use up to 4 sentences. Provide the “what.” What is the purpose and key tasks for the action?)* | | | | | | | | | | | |
| **8. Statement of Need:** *(Use a short paragraph. Provide the “why.” What problem(s) will the action solve? Why now?)* | | | | | | | | | | | |
| Part 1: Sketch Action Plan Worksheet (continued) | | | | | | | | | | | |
| **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 Section# number(s):  Was it completed?  Completed  Partially Completed  Not Addressed | | | | | | | | | | | |
| **10. Past Work and Pre-Conditions:** *(What can we learn from past work that has already occurred regarding this action? Are any necessary pre-conditions for the successful pursuit of the action complete or included as part of the action? For example, what studies, plans, or other information is in place to inform action development? Provide citations and links.* | | | | | | | | | | | |
| **11. 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  Shell fishing Areas  All  None | | | | | | | | | | | |
| **12. Vision 2032 Goals/Objectives** *(Click one or more goals/objectives that this action most 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 data. | | | | | | | 3. Empowerment. Identify and support local organizations 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 WWTPs, CSOs, MS4s, and septic systems. | | 6. Trash. Pursue trash-free watersheds. | | | | | 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 sustainable and equitable land use decisions. | 10. Freshwater living resources. Restore connectivity, function, and resilience of freshwater systems. | | | 11. Estuary living resources. Restore and preserve estuarine and coastal habitats. | | | | | | 12. Wildlife. Protect and document biodiversity. | |
| Goal #4: Assure safe and equitable access to and use of nature. | | | | | | | | | | | |
| 13. Public access. Increase access and enjoyment of the region’s common resources. | | | | | 14. Sustainable use. Protect nature through responsible use of existing natural resources. | | | | | | |

Part 1: Sketch Action Plan Worksheet (continued)

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| **13. Action Screening Criteria:** *(In a sentence or two, confirm the following statements:*  a. The action is not already completed. |
| 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(s) under Question 12 and/or Goal(s)/Objective(s) under Question 13. |
| d. The action will create results that are specific and measurable against outputs. |
| e. The action is achievable within 10 years. |
| f. An entity has been identified that can implement and/or coordinate implementation. |
| **14. Vision 2032 Readiness—Based on answers to Questions 1-14, is this action ready to be developed into Draft Action Plan by completing Parts 2-5 at this time?**  Yes. Name of Lead (organization/individual) that will implement the Action:  No. Please explain: |

Part 2: Task Worksheet

**Potential Tasks & Timeline:** *(Fill out table. Please list any 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 3 and 4 will inform inclusion of a final list of tasks in Part 5.)*

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| Potential Task Title (up to 5) | Brief Description | Outputs | Timeline  (S, M, L) |
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Part 3: Impact Assessment Worksheet

The purpose of Part 3 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 2 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. 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?)* | |
| *Potential Impacts* | *Potential revisions to action/task* |
|  |  |
| **2. 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?).* | |
| *Potential Impacts* | *Potential revisions to action/task* |
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Part 3: Impact Assessment Worksheet (continued)

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| **3. 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 peoples were historically or are currently present at the project location or impacted by the project?)* | |
| *Potential Impacts* | *Potential revisions to action/task* |
|  |  |
| **4. Other Environmental & Socioeconomic Impacts:**  *Use bullets that link potential impact and revision to address it. Consider additional impacts of the action. Could action completion affect any NBEP Indicators (See Part 1, #11) or Vision 2032 Goals/Objectives (See Part 1, #12)?* | |
| *Potential impacts* | *Potential revisions to action/task* |
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# Part 4: Outreach Planning Worksheet

All Action Plans must involve appropriate “interested parties” in its development OR a process for including them must be built into the action. The purpose of Part 4 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 3, 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 | Type of Outreach Activity | Lead Messenger | Timing |
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# Part 5: Draft Action Plan Template

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| **Goal** |  |
| **Objective** |  |
| **Action Title** |  |
| **Action Type** |  |
| **Responsible Party** |  |
| **Collaborators** |  |
| **Need** |  |
| **Description** |  |
| **Location/Scale** |  |
| **Implementation Timeline** |  |
| **Tasks** |  |

# Part 5: Draft Action Plan Template (continued)

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| **Goal** |  |
| **Objective** |  |
| **Action Title** |  |
| **Outputs** |  |
| **Outcomes** |  |
| **Estimated Cost** |  |
| **Resource Needs** |  |
| **Guidance** |  |