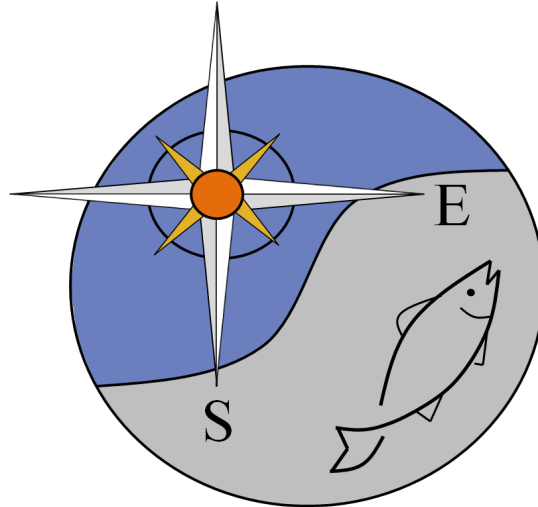


SEDAR



SEDAR Steering Committee Meeting Summary March 25-26, 2024

Charleston, SC

Report Content Note:

To provide context for recommendations and maintain the full record, this document combines the briefing summary provided to the Committee for consideration during the meeting as well as summary of Committee discussion points and recommendations.

Outcomes from the meeting are found under the section headers “Meeting Outcome” for each relevant section and are italicized throughout the report.

Version: FINAL

5/29/2024

Table of Contents

1 INTRODUCTION8

2 SEDAR PROJECTS REPORT8

3 SEDAR PROCESS REVIEW AND DISCUSSION9

4 ASSESSMENT SCHEDULE REVIEW16

5 OTHER BUSINESS18

6 NEXT MEETING18

DOCUMENTS

Attachment 1: October 2023 Draft Meeting Summary

Attachment 2: SEDAR Projects Update February 2024

Attachment 3: SEFSC Process Suggestions Presentation

Attachment 4: SEDAR Projects List

Attachment 5: Modifications to the Project Planning Grid from the October 2023 Steering Committee Summary

Attachment 6: SEFSC Data Provisioning Update Presentation

COMMITTEE MEMBERS

Clay Porch, Chair, SEFSC

Karyl Brewster-Geisz, HMS

John Carmichael, SAFMC

Dave Donaldson, GSMFC

Carolyn Belcher, SAFMC

Bob Beal, ASMFC

Carrie Simmons, GMFMC

Andy Strelcheck, SERO

Kevin Anson, GMFMC

Luiz Barbieri, FWC/FWRI

Carlos Farchette, CFMC

Miguel Rolón, CFMC (via webinar)

SEDAR STAFF

Julie A. Neer

MEETING OBSERVERS

Kelly Adler, SEFSC

John Froeschke, GMFMC Staff

Shannon Cass-Calay, SEFSC

Vivian Matter, SEFSC

Chip Collier, SAFMC Staff

Katie Siegfried, SEFSC

JD Dugas, GMFMC

WEBINAR OBSERVERS

Dustin Addis, FWC

Lisa Ailloud, SEFSC

Sarina Atkinson, SEFSC

Beverly Barnett, SEFSC

Myra Brouwer, SAFMC Staff

Wally Buble, SCDNR

Manuel Coffill-Rivera

Dean Courtney, SEFSC

Judd Curtis, SAFMC Staff

LaTreese Denson, SEFSC

Michael Drexler, Ocean Conservancy

Francesca Forrestal, SEFSC

Emilie Franke, ASMFC

Graciela Garcia-Moliner, CFMC Staff

Bob Gill, GMFMC

Ron Hill, SEFSC

Jeanette Huber, FWC

Heather Moncrief-Cox, SEFSC

Matthew Nuttall, SEFSC

Ashley Pacicco, SEFSC

Michaela Pawluk, SEFSC

Cassidy Petterson, SEFSC

Ryan Rindone, GMFMC Staff

Skyler Sagarese, SEFSC

Mike Schmidtke, SAFMC Staff

Amy Schueller, SEFSC

Rebecca Scott, FWC

Tracey Smart, SCDNR

Matt Smith, SEFSC

Molly Stevens, SEFSC

Kevin Thompson, SEFS

Laura Thornton, SEFSC

Nathan Vaughan

Matthew Vincent, SEFSC

Erik Williams, SEFSC

Meeting Outcomes Summary

This Meeting Outcomes Summary highlights the major decisions of the Committee during the meeting. Additional details can be found under the heading “Meeting Outcome” for each relevant section and are italicized throughout the report.

SEDAR Process Review and Discussion

Summary and Recommendations from SEFSC/Gulf and SA Council Staff Discussions Regarding Efficiency:

The Committee received a presentation from SEFSC Staff on suggested modifications to the SEDAR process to improve throughput and timeliness. The main recommended changes were to:

- 1) Eliminate the RT/OA Process*
- 2) Eliminate nomenclature and slot concept.*
- 3) Identify key stocks and prioritize them.*
- 4) Remaining stocks could be assessed using less time-consuming approaches.*

The Committee agreed with the Center recommendation to eliminate the Research Track/Operational Assessment process, as it has not proven to be helpful in increasing throughput or timeliness.

The concept of removing the Benchmark and Operational terminology and calling all projects Assessments beginning with projects not yet underway was supported by the Committee.

The SEFSC recommended removing the “slot concept” for determining how many assessments can be completed in a year.

The Center requested a prioritized list of the species from each Cooperator, indicating which are “must haves” and which are lower priorities. Additionally, guidance on what project structure (e.g. which add-ins) the Cooperators were envisioning for each species would be helpful. With that information, the Center and Cooperator can have a conversation regarding what can be accomplished.

The Add-on component approach to assessment structure was interesting to the Committee.

- The approach of better aligning the assessment methodology with the quantity and quality of the data available was strongly supported.*
- The lack of guardrails to keep project structure from changing could be an issue.*
- There was some concern that the Add-on approach may end up being too cumbersome of a process, resulting in assessments as or more complicated than what the process is currently struggling with.*
- The role of the Cooperators and their technical bodies in determining what parts of the process will be included for a given project needs further discussion.*
- The need for conversations with the participants who are involved in the assessments is necessary to aid in the understanding of what changes are needed and how best change may be implemented.*
- The Center believes it will be important for the assessment structure (i.e. what add-ons will be included) to be determined and agreed upon before the assessment gets underway.*

- *One Cooperator questioned the rationale for making the decision regarding structure of the process before the data have been evaluated.*
- *If modifications need to be made once an assessment has begun, who should be involved in those discussions (e.g., Cooperators? SSC?), and who makes the final determination what modification (if any) will be incorporated?*
- *The Center envisioned meeting with Cooperator staff several times a year to negotiate process structure and the number of assessments that can be accommodated.*
- *The lead analytic agency (i.e., SEFSC or FWC) will make the decision on the final structure for a given project.*
- *It was noted that there is a difference between transparency and participation and the Cooperators should consider this when discussing add-in options.*

The ultimate goal of the suggested changes is to have higher throughput, meaning more net information for use in management decisions.

There was a request from some Cooperators to receive consolidated/updated data triage information from the Center for their stocks to aid in their understanding of what types of less complex models may be available for consideration. This might also aid in determining key stocks.

The determination for which stocks might be served by less-complex methods for providing management advice will need to be shared among the Center, Regional Office, and the Cooperators.

It might be useful to have the Center provide guidance/criteria for determining key stocks. The Committee identified the following items which may aid in the selection of key stocks:

The Committee recognized the need to have a clear and deliberate plan to integrate the SSC/Technical bodies into this process.

There was a request to have the SEFSC provide information on the nature of the bottlenecks that have impeded throughput in the past (e.g., ageing, larval sample processing, video analysis, calculating total removals).

The current independent peer review process may require revision.

The Committee wondered if some efficiencies may be gained by holding data or review workshops for several species at one time.

The Committee identified the need for a strong communication plan as these changes are developed and shared with participants throughout the process.

The Committee suggested the SEFSC compile the best practices documentation into one location/report and provide a list of data sets/topics for which dedicated time to address best practices may increase efficiency in the long term. This may include re-establishing the Best Practices Working Group, which was assembled after Procedural Workshop #7 Data Best Practices in 2015.

Procedural workshops to focus on outstanding data issues which affect multiple species should be considered. Designating time and funding for Procedural Workshops may prove very useful in the long term.

There was a request to identify a way to allow for time to complete PW#8 (Indices). Dr. Barbieri indicated that he believed his staff would have some time to work on this project. SEDAR Staff will work with the workshop leads to move this forward.

It was suggested that the Steering Committee should set the overarching goals for the process, including things it would like to see changed (e.g., reduce or eliminate SSC rework, relevant peer review process) but recommendations for how to initiate change needs to come for those actively involved in the process today (e.g., SSC members, data providers, SEDAR staff).

The Committee supported conversations with other assessment processes from around the country to gain insight in how they may be handling similar issues.

Discussion of SEDAR Policy on Virtual Public Comment at In-person Meetings:

The Committee supported their previous decision to not allow virtual participation at in-person meetings and clarified that included no virtual public comment. SEDAR Staff will read the statement regarding options for public comment of individuals not in attendance during the designated public comment sessions at in-person meetings. SEDAR Staff will also consider ways to improve awareness in the online public comment tool available for each assessment.

Assessment Schedule Review

The Committee reviewed the project planning grid to get an understanding of the timing of assessments for 2024 and 2025.

Discussions regarding the 2026 schedule focused mainly on the South Atlantic and Gulf of Mexico proposed stocks:

- *SA: King Mackerel, Gray Triggerfish, Snowy Grouper, Gag Grouper, Red Grouper*
- *Gulf: Greater Amberjack, Cobia, Gag Grouper*

Given the need to further discuss the proposed changes to the planning of assessments, no decisions for the 2026 South Atlantic and Gulf of Mexico projects were finalized.

Discussion of Performance Work Statements for CIE Reviewers: *The Center will work with SEDAR Staff developing these to achieve a broad poll of potential reviewers, as well as CIE reviewers with regional or national experience.*

Table 1: SEDAR Project Planning Grid – March 2024 SEDAR Steering Committee Outcome
 Table Color Legend:

Steering Committee Approved and SEFSC Scheduled Projects					FUTURE Requests											
Steering Committee Approved, PENDING SEFSC SCHEDULING					2026 Preliminary Projects – To Be Finalized at the Spring 2024 Meeting											
SEDAR SCHEDULE OVERVIEW – March 2024 SEDAR Steering Committee Outcome																
YEAR	SA Team				Gulf Team					Caribbean Team		HMS Team		FL FWCC	Menhaden/ RW only	
	1	2	3	4	1	2	3	4	5	1	2	1	2			
2024		S82 Gray Triggerfish RT		S89 Tilefish OA	S88 Red Grouper OA					S84 Yellowtail Snapper (PR & STT/STJ) and Stoplight Parrotfish (STX) Benchmark				S79 Mutton Snapper Benchmark	S96 YTS OA	S93 ASMFC Red Drum (RW)
2025	S90 Red Snapper Benchmark	S95 Atlantic Migratory Cobia Benchmark	S92 Blueline Tilefish OA						S87 White, Pink, and Brown Shrimp Benchmark		S91 Spiny Lobster (all islands) Benchmark		S770A Hammerhead Sharks		Black Grouper MSE (24/25)	S97 GSMFC Menhaden OA
2026	SA King Mackerel	S820A Gray Triggerfish	Snowy Grouper Gag Grouper	Red Grouper –single stock continuity -External Peer Review	Greater Amberjack	Gray Triggerfish			Gag Grouper OA	Hogfish (PR) and Red Hind (USVI)			Bull and Sandbar Sharks	S94 Hogfish		ASMFC Menhaden (RW)
2027			Red Porgy						Tilefish Complex?	Scamp						GSMFC Menhaden
2028	Vermilion	Greater Amberjack				Gray Snapper	Vermilion						Dolphin/Wahoo (MP?)			ASMFC Menhaden
2029																
2030																

Timing of projects shown in this table is approximate and is intended for SEDAR Steering Committee workload planning purposes only. Please consult individual project schedules for specific start and end dates.

1 Introduction

1.1 Documents

- Agenda
- Attachment 1. October 2023 Draft Meeting Summary

1.2 Action

- Introduction
- Review and Approve Agenda
- Approve Meeting Summary

MEETING OUTCOME

The Committee adopted the agenda, with a few additions to other business, and approved the October 2023 Draft Meeting Summary.

2 SEDAR Projects Report

2.1 Documents

Attachment 2. SEDAR Projects Update February 2024

2.2 Summary

The projects report (Attachment 2) provides a summary of current and recently completed SEDAR assessment projects.

Highlighted project developments:

SEDAR 82 – South Atlantic Gray Triggerfish: The Data Workshop report was released in January of 2023. The Assessment process is ongoing with a series of webinars scheduled from March 2023 to November 2023. The Review Workshop was scheduled for October 2023, however the lead analyst requested additional webinars. The Review Workshop will be held March 12-14, 2024. The assessment should be completed in May 2024.

SEDAR 94 – Florida Hogfish: The Benchmark assessment for SE hogfish was slated to begin in 2024 but has been postponed until 2025 to allow for a yellowtail snapper operational assessment to be conducted in 2024. The Terms of Reference have been approved by the Gulf and South Atlantic Councils, and some participants have been appointed. SEDAR will work with the Florida assessment team to revise the Project Schedule to accommodate this shift in timing. Once an updated schedule is developed, SEDAR will work with the appropriate Councils to update and finalize participants.

SEDAR 96 – Southeastern US Yellowtail Snapper: The Gulf and South Atlantic Councils requested that an operational assessment for yellowtail snapper be conducted as soon as possible once the information regarding the possible bias in the MRIP FES was reported. The

Florida State Reef Fish Survey (SRFS) may provide more precise and timely estimates and the Councils wanted to explore the option through an updated assessment. Requests to approve the Terms of Reference and appoint participants were sent to both Councils in February 2024. The assessment is scheduled to have one Topical Working Group to review recreational catch information. Webinars will be held May – September 2024. The assessment is scheduled to be completed in late 2024.

2.3 Action

- Informational; none required

MEETING OUTCOME

The Committee had no recommendations on the Project Updates.

3 SEDAR Process Review and Discussion

3.1 Documents

Attachment 3: SEFSC Process Suggestions Presentation

3.1 Summary

Summary and Recommendations from SEFSC/Gulf and SA Council Staff Discussions Regarding Efficiency:

The Center will propose improvements to the Gulf and South Atlantic stock assessment processes, informed by discussions with Council Staff. These recommendations may be of interest to other SEDAR cooperators. Decision points may include:

- 1) Identification of "key stocks" and assignment of these stocks to a permanent rotating calendar.
- 2) Appropriate frequency of SEDAR stock assessments
- 3) Approaches to update management advice between full assessments, and their timing
- 4) The potential for extra-SEDAR assessments to address emergent concerns
- 5) Recommendations to improve the timeliness of stock assessment advice
- 6) Implications for 2026 stock assessment calendar

Discussion of SEDAR Policy on Virtual Public Comment at In-person Meetings:

At the May 2023 meeting, Committee agreed to broadcast data and review workshop plenary sessions. This will be a broadcast-only feature and will not be configured for remote participation. This change would allow individuals not in attendance to observe the proceedings.

The Committee did not specifically discuss or provide guidance on allowing virtual public comment during the data or review workshops. During the SEDAR 74 Gulf of Mexico Snapper review workshop, the topic of allowing virtual public comment was raised. Given the guidance

that had been provided stating that the broadcasts were being offered to allow observation but not participation, virtual public comment was not allowed.

SEDAR Staff prepared the following statement that was read into the record at the beginning of each Public Comment session during the workshop:

Beginning in 2023, SEDAR began broadcasting the plenary sessions of in-person SEDAR meetings to allow individuals not able to attend the meeting the ability to observe the process. Individuals in attendance at the meeting may provide comment on the science of the stock assessment being considered during the public comment periods. Individuals not in attendance may make a comment at any time during the process using the online comment form found on the SEDAR website for the individual stock assessment.

Comments on management should be directed to the appropriate management body.

The Committee is asked to discuss the approach taken and if modifications need to be considered.

Guidance for Operational Assessments without TWGs when issues arise during the assessment process:

The Committee has previously discussed the process for when the lead analyst for an Operational Assessment with no Topical Working Groups discovers issues during the assessment. The informal guidance provided a plan for the analyst to reach out to the Cooperator, to discuss how to move forward, often involving a discussion with the SSC. Several recent OAs have had this issue arise and how this issue was handled varied by Cooperator. The Committee is asked whether more formal guidance is needed.

3.1 Action

- Provide feedback on the possible changes to the SEDAR process, including guidance on virtual public comment during in-person meetings.

MEETING OUTCOME

Summary and Recommendations from SEFSC/Gulf and SA Council Staff Discussions Regarding Efficiency:

The Committee received a presentation from SEFSC Staff on suggested modifications to the SEDAR process to improve throughput and timeliness. The main recommended changes were to:

- 5) *Eliminate the RT/OA Process*
- 6) *Eliminate nomenclature and slot concept.*
- 7) *Identify key stocks and prioritize them.*
- 8) *Remaining stocks could be assessed using less time-consuming approaches.*

The Committee agreed with the Center recommendation to eliminate the Research Track/Operational Assessment process, as it has not proven to be helpful in increasing throughput or timeliness.

The concept of removing the Benchmark and Operational terminology and calling all projects Assessments beginning with projects not yet underway was supported by the Committee.

- *Assessment category nomenclature has been a longstanding issue.*
- *It is difficult not to apply quality to the different assessment categories.*
- *Removing the assessment categories will likely remove some of the clarity for stakeholders regarding what can and cannot be done in a specific project.*

The SEFSC recommended removing the “slot concept” for determining how many assessments can be completed in a year.

- *The current grid approach is organized by analyst but that is not the only factor impacting throughput and this presentation of the schedule may not be useful moving forward.*
 - *There may need to be more than one way the projects are presented: big picture for the Cooperators and finer scale for those who need more details.*
 - *SEDAR Staff will work with Center Staff to brainstorm options for the next Steering Committee meeting.*
- *It was noted that one Cooperator may not get the same number of assessments as another Cooperator for a given year, but it should level out over 2-3 years.*
- *The desire is to move away from identifying which specific stocks will be assessed two years in advance.*

The Center requested a prioritized list of the species from each Cooperator, indicating which are “must haves” and which are lower priorities. Additionally, guidance on what project structure (e.g. which add-ins) the Cooperators were envisioning for each species would be helpful. With that information, the Center and Cooperator can have a conversation regarding what can be accomplished.

- *The Center’s intention is to put in as many projects as possible, while allowing for some flexibility for unanticipated changes that may be required.*
- *It was noted that there is value in continuity in advice and frequent updates.*

The Add-on component approach to assessment structure was intriguing to the Committee.

- *The approach of better aligning the assessment methodology with the quantity and quality of the data available was strongly supported.*
- *The lack of guardrails to keep project structure from changing could be an issue.*
- *There was some concern that the Add-on approach may end up being too cumbersome of a process, resulting in assessments as or more complicated than what the process is currently struggling with.*
 - *Two-year assessment processes lead to terminal years that are very out of date.*
 - *Is there a way to update the data before the projections to update the terminal year?*

- *The role of the Cooperators and their technical bodies in determining what parts of the process will be included for a given project needs further discussion.*
- *The need for conversations with the participants who are involved in the assessments is necessary to aid in the understanding of what changes are needed and how best change may be implemented.*
- *The Center believes it will be important for the assessment structure (i.e. what add-ons will be included) to be determined and agreed upon before the assessment gets underway.*
- *One Cooperator questioned the rationale for making the decision regarding structure of the process before the data have been evaluated.*
 - *Data evaluation is necessary to determine what model and process structure might be appropriate.*
 - *Work on the front end of the process needs to be conducted so that the data process is efficient and focuses on what data are needed, and not waste time developing data sets that are not appropriate for the modeling approach that will be used.*
 - *The Center agreed that understanding the data available would be helpful for recommending model complexity and process approach.*
 - *Would it be possible to do an initial data review for a species and have the assessment analyst present a recommendation to the technical bodies regarding what type of assessment could be conducted?*
- *If modifications need to be made once an assessment has begun, who should be involved in those discussions (e.g., Cooperators? SSC?), and who makes the final determination what modification (if any) will be incorporated?*
- *The Center envisioned meeting with Cooperator staff several times a year to negotiate process structure and the number of assessments that can be accommodated.*
 - *It is assumed that the rationale for the add-ons requested will come from the Cooperator through its internal process.*
 - *The more complex a process, the fewer assessments that can be scheduled.*
- *The lead analytic agency (i.e., SEFSC or FWC) will make the decision on the final structure for a given project.*
- *It was noted that there is a difference between transparency and participation and the Cooperators should consider this when discussing add-in options.*

The ultimate goal of the suggested changes is to have higher throughput, meaning more net information for use in management decisions.

There was a request from some Cooperators to receive consolidated/updated data triage information from the Center for their stocks to aid in their understanding of what types of less complex models may be available for consideration. This might also aid in determining key stocks.

- *The Center noted they frequently don't receive all the data until the data deadline once an assessment is underway, which makes a complete data triage difficult.*
- *It should be possible for the Center to provide a qualitative summary of the data available for some species, but a rigorous data review is not possible in a timely fashion.*
- *There may be additional information that can inform these discussions.*

The determination for which stocks might be served by less-complex methods for providing management advice will need to be shared among the Center, Regional Office, and the Cooperators.

- *Many factors weigh in this decision such as data availability, political issues, and other background information.*
- *The Center will need to provide initial recommendations on what an appropriate model structure is for a given species.*
- *Time should be dedicated to determining what are the most useful procedures for stock assessment approaches.*
- *Dedicated research time may be required to ensure that alternative assessment approaches are scientifically sound for a given species.*
- *It is important to agree that simpler models (e.g., surplus production) will be accepted by the Center as a stand-alone metric for a stock to support management advice.*
- *Less complex approaches may be useful for monitoring, based on the management approach being considered.*

It might be useful to have the Center provide guidance/criteria for determining key stocks. The Committee identified the following items which may aid in the selection of key stocks:

- *The Center should provide guidance regarding how many species they can keep up with ageing, which is critical to understanding how many age-structured assessments might be completed.*
 - *Similar information regarding other data sources (e.g. indices) may be helpful.*
- *It was noted that key stocks might change over time in response to environmental, fishery, or management changes.*
- *The Center needs to provide some context to the number of assessments that may be possible region-wide. This will focus the Cooperator conversations on a reasonable number. It is acknowledged that the actual number in a given year will depend on the structure of those assessments being undertaken.*
- *The more key stocks that are identified, the longer the time interval between assessments for that species.*
- *A smaller number of key stocks will allow for more flexibility in the schedule.*

The Committee recognized the need to have a clear and deliberate plan to integrate the SSC/Technical bodies into this process.

- *They should be involved early in the development of the process overall, as well as providing guidance for specific assessment projects.*
- *Technical bodies may be able to provide guidance on key species, along with what types of assessments may be appropriate.*
- *Input from the SSCs regarding process decisions such as the need for an external peer review, or what working groups may be needed to address their concerns, will aid in setting expectations regarding how the assessment process will proceed.*
- *Technical body participants need to have sufficient time to review materials/presentations prior to a webinar so they may provide useful feedback to the analytic team.*

- *Clarifying roles/expectations of SSC participants would be helpful. This may be Cooperator specific.*
- *Integrating technical bodies fully in the development of the assessment should help to minimize the SSC rework time after the assessment is complete.*
- *Removing the Assessment Development Team component from the process (as it was restricted to RTs) will allow SSC members to focus their time on components of the process where they think they can contribute the most. They will no longer be requested to volunteer for 12 or more months over several components of the process.*
- *A discussion regarding how to improve SSC participation during the assessment process should be held with the SSCs themselves so they may provide recommendations.*

There was a request to have the SEFSC provide information on the nature of the bottlenecks that have impeded throughput in the past (e.g., ageing, larval sample processing, video analysis, calculating total removals).

- *Are there places where efficiency can be gained in data processing?*
- *Can there be more integration with the many data providers to ensure data arrive in appropriate formats?*

The current independent peer review process may require revision:

- *Cooperators are encouraged to scrutinize review terms of reference to ensure the appropriate questions are being considered.*
- *What triggers the need for an external peer review?*
 - *If SSC is comfortable reviewing the proposed modifications, then no need for external peer review.*
 - *If the assessment evolves beyond that, then an external peer review may need to be added.*
- *The CIE is a construct of NOAA/NMFS. As such, the Agency should be able to have some influence on how the process is functioning.*
- *It was noted that discussions are happening at the national level about if the CIE is still providing what is needed.*
 - *Recently there has been a shifting baseline of what is expected within the assessment by reviewers.*
- *Increased SEFSC involvement with developing Performance Work Statements should help improve the ability to receive appropriate CIE appointees (broad poll of potential reviewers, regional or national experience).*
- *It will be helpful to ensure that all appointed reviewers (i.e., SSC and CIE) understand that they are equal participants on the Review Panel.*

The Committee wondered if some efficiencies may be gained by holding data or review workshops for several species at one time.

- *It was noted that this used to happen regularly.*
- *It may be possible to reintroduce this approach for species where the data requirements are similar, and the overall data requirements are not as burdensome to develop.*

The Committee identified the need for a strong communication plan as these changes are developed and shared with participants throughout the process.

- *One consistent voice (e.g., Center or SEDAR) will be beneficial as this proposal is finalized.*
- *Setting clear expectations and explaining the benefits and trade-offs with this approach will be critical for success.*
- *It will be important to explain the Cooperators' desire for timely, consistent management advice.*
 - *Most complex assessment types may not be needed to accomplish this.*
- *Additional discussion on how to improve presentation of assessment results (e.g., SSC vs Council vs Peer Review panel) is needed.*
 - *May need different reports for different audiences.*
- *Noted that this will be a major paradigm shift from business as usual and it will likely take multiple steps to accomplish.*

The Committee suggested the SEFSC compile the best practices documentation into one location/report and provide a list of data sets/topics for which dedicated time to address best practices may increase efficiency in the long term. This may include re-establishing the Best Practices Working Group, which was assembled after Procedural Workshop #7 Data Best Practices in 2015.

Procedural workshops to focus on outstanding data issues which affect multiple species should be considered. Designating time and funding for Procedural Workshops may prove very useful in the long term.

- *The SEFSC should consider what topics might be appropriate for this approach.*
- *Specific data topics that may benefit from dedicated work included:*
 - *Age data flow/ age composition data*
 - *Database improvements for the age data*
 - *Shrimp landings*
 - *Recreational removals*

There was a request to identify a way to allow for time to complete PW#8 (Indices). Dr. Barbieri indicated that he believed his staff would have some time to work on this project. SEDAR Staff will work with the workshop leads to move this forward.

It was suggested that the Steering Committee should set the overarching goals for the process, including things it would like to see changed (e.g., reduce or eliminate SSC rework, relevant peer review process) but recommendations for how to initiate change needs to come for those actively involved in the process today (e.g., SSC members, data providers, SEDAR staff).

- *A variety of small working groups with varying expertise on the changes the Committee would like to see may be helpful to develop approaches to achieve those goals.*
- *Potential topics to discuss:*
 - *presentation of assessment results (SSC vs Council vs Peer Review panel)*
 - *External Peer Review improvements*

- *SSC involvement*
- *Involvement of those in the process will aid in their feeling of ownership and support for changes.*

The Committee supported conversations with other assessment processes from around the country to gain insight in how they may be handling similar issues.

- *Communication and collaboration with other regions will become increasingly more common as stocks move due to climate change.*

Discussion of SEDAR Policy on Virtual Public Comment at In-person Meetings:

The Committee supported their previous decision to not allow virtual participation at in-person meetings and clarified that included no virtual public comment. SEDAR Staff will read the statement regarding options for public comment of individuals not in attendance during the designated public comment sessions at in-person meetings. SEDAR Staff will also consider ways to improve awareness in the online public comment tool available for each assessment.

Guidance for Operational Assessments without TWGs when issues arise during the assessment process:

Given the proposed changes to the SEDAR process, this topic did not seem relevant and was not discussed.

4 Assessment Schedule Review

4.1 Documents

Attachment 4: SEDAR Projects List

Attachment 5: Modifications to the Project Planning Grid from the October 2023 Steering Committee Summary

4.2 Summary

The SEFSC did not provide a draft 2026 schedule for discussion prior to the posting of the Briefing materials for this meeting. The development of the 2026 schedule may be influenced by the discussions the Committee during the Spring meeting.

4.3 Action

- Consider any needed modifications to the 2024 and 2025 Projects
- Finalize the 2026 Projects Schedule
- Discuss Future Project Requests (2027-2029)

MEETING OUTCOME

The Committee reviewed the project planning grid to get an understanding of the timing of assessments for 2024 and 2025.

The Committee was informed that moving forward the king mackerel assessments will no longer be conducted by the HMS Branch of the SEFSC, but rather they will be conducted by the Gulf and South Atlantic assessment branches. The rationale is to develop some consistency and familiarity with the assessments and assessment leads.

- *It was noted that the South Atlantic king mackerel assessment will need to be transitioned from Stock Synthesis to BAM.*
- *A continuity run will need to be produced due to the shifting of platforms.*

Modifications to the 2024 and 2025 were as follows:

South Atlantic: *The S90 red snapper beginning in 2024 was changed from a RT to a Benchmark.*

Gulf of Mexico: *The Council requested a Benchmark assessment for red snapper to begin in 2024. The intent is for a streamlined in-person Data Workshop, an assessment panel, and an external in-person peer review. It will be SEDAR 98. The S87 Research Track for Gulf Shrimp was modified to a Benchmark. Gray Triggerfish will be an assessment with add-ons, currently slated to begin in 2025. It may not need an external peer review.*

HMS: *The S77 Hammerhead Sharks Operational Assessment will be completed during 2024. The next Assessment beginning in 2025 will assess sandbar and bull sharks.*

Florida Assessments: *No timing modifications were suggested. It was noted that Florida will need to communicate with the Center regarding data needs for the Black Grouper MSE.*

ASMFC, GSMFC, and Caribbean: *No timing modifications were suggested.*

Discussions regarding the 2026 schedule focused mainly on the South Atlantic and Gulf of Mexico proposed stocks:

- *SA: King Mackerel, Gray Triggerfish, Snowy Grouper, Gag Grouper, Red Grouper*
- *Gulf: Greater Amberjack, Cobia, Gag Grouper*

Given the need to further discuss the proposed changes to the planning of assessments, no decisions for the 2026 South Atlantic and Gulf of Mexico projects were finalized.

The Caribbean Council requested adding Dolphinfish and Wahoo to their list of potential species for 2027. The Center noted that they would likely not do a unit stock assessment for dolphinfish given it is not a unit stock, but would likely recommend a management procedure, similar to what is being done for the South Atlantic.

- *The Center would like to focus on data-limited management procedures for the Caribbean moving forward.*
- *To that end, the Center recently hired an analyst with MSE capability.*

The GSMFC and ASMFC requested menhaden assessments for 2027 and 2028 respectively.

5 Other Business

5.1 Documents

Attachment 6: SEFSC Data Provisioning Update Presentation

5.2 Summary

- Update on the status of SEFSC efforts to automate data provisioning.

The Science Center will provide an update on the work to improve the automation and timeliness of data for use in stock assessment.

5.3 Action

- The Committee should discuss the issues and provide recommendations if needed.

MEETING OUTCOME

The Center update on Data Provisioning was folded into the process discussion presentation, thus a separate attachment was not provided. Please see above for discussions regarding data provisioning.

Three additional items were added to Other Business:

- 1) Discussion of Performance Work Statements for CIE Reviewers.*
- 2) Reminder regarding appointing assessment process participants for Benchmark assessments.*
- 3) Update on the ability to get Government rates for SEDAR meetings.*

Discussion of Performance Work Statements for CIE Reviewers: The Center will work with SEDAR Staff developing these to achieve a broad poll of potential reviewers, as well as CIE reviewers with regional or national experience.

Reminder regarding appointing assessment process participants for Benchmark assessments: It was clarified that a Cooperator should appoint technical individuals to serve during the assessment webinar portion of an assessment. Ideally there will be some individuals who will serve on both the data and assessment portions of the process. Non-technical individuals may be appointed as observers.

Update on the ability to get Government rates for SEDAR meetings: The Committee was informed of the recent trend of hotels not extending the government rate to non-Federal employees, even if they book through our meeting room block. If a hotel extends the government rate to all our participants, we will continue to include the Federal employees attending in the SEDAR room block. If not, our federal partners will be provided the hotel information but will book outside of the meeting room block.

6 Next Meeting

The Committee is asked to make scheduling recommendations and suggest topics for the next meeting. SEDAR Staff would suggest that the next meeting be held via webinar in July/August 2024.

MEETING OUTCOME

Given the potential changes to the process discussed during this meeting, and the amount of work needed by the Cooperators to move the process forward, the Committee agreed to hold a brief check-in webinar in May 2024 to review the summary report and provide updates on their work regarding the proposed process changes.

The Committee agreed that the next SEDAR Steering Committee meeting will be held via webinar in August 2024 (late July 2024 if needed).

Table 1: SEDAR Project Planning Grid – March 2024 SEDAR Steering Committee Discussion Draft

Table Color Legend:

Steering Committee Approved and SEFSC Scheduled Projects	FUTURE Requests
Steering Committee Approved, PENDING SEFSC SCHEDULING	2026 Preliminary Projects – To Be Finalized at the Spring 2024 Meeting

SEDAR SCHEDULE OVERVIEW – March 2024 SEDAR Steering Committee Outcome

YEAR	SA Team				Gulf Team					Caribbean Team	HMS Team		FL FWCC	Menhaden/ RW only	CMP	
	1	2	3	4	1	2	3	4	5	1	1	2				
2024		S82 Gray Triggerfish RT		S89 Tilefish OA	S88 Red Grouper OA					S84 Yellowtail Snapper (PR & STT) Stoplight Parrotfish (STX) Benchmark			S79 Mutton Snapper Benchmark	S96 YTS OA	S93 ASFMC Red Drum (RW) S97 Gulf Menhaden OA	
2025	S90 Red Snapper Benchmark	Atlantic Migratory Cobia Benchmark		Dolphin MP RW Only		Gray Triggerfish OA? Benchmark?		Gag Grouper OA	S87 Shrimp RT (Switch to Benchmark?)		S91 Spiny Lobster Benchmark (all islands)	S77OA Hammerheads		S94 Hogfish Benchmark	Atl Menhaden (RW only)	King Mackerel OA (Gulf)
2026		S82OA Grey Triggerfish	Snowy Grouper OA	Red Grouper Benchmark	GAG Benchmark		Cobia OA?		S87 OA Shrimp	Hogfish (PR) Red Hind (USVI) Benchmark		Bull, Spinner, Tiger, Finetooth Sharks RT (Finalize Species Switch to Benchmark?)			King Mackerel OA (SA)	
2027			Gag Grouper OA													
2028		GAG Benchmark	Red Porgy OA				Tilefish Complex OA?	Scamp OA								
2029																
2030																

Timing of projects shown in this table is approximate and is intended for SEDAR Steering Committee workload planning purposes only. Please consult individual project schedules for specific start and end dates.