SEDAR Procedures Workshop 7
Data Best Practices

Workshop Goal
To identify common decisions made in SEDAR data workshops that have successfully been through the peer review process, and to develop recommended best practices to help support and streamline such decisions for future assessments.

Workshop Description and Need
SEDAR procedural workshops provide an opportunity for focused discussion and deliberation on topics that arise in multiple assessments and are structured to develop best practices for addressing common issues across assessments. The seventh procedural workshop will develop best practice recommendations for common decisions made at SEDAR Data Workshops.

Throughout the course of SEDAR data workshops, certain topics arise repeatedly in discussions. Discussions related to these topics often occupy considerable time in data workshops as participants work to come up with reasonable solutions and at least document, or in some cases revisit, past solutions to common issues. In a process that is severely limited by time and resources and increasingly challenged to increase productivity, effort spent readdressing an issue that has been considered numerous times prior is effort that is lost to addressing the new or unique issues of a particular stock. Since many data challenges are inherent to data collection programs and therefore the same from stock to stock, decisions and approaches for dealing with common challenges could be standardized. Doing so could give data providers the guidance they need to better prepare for workshops, allow workshop participants to focus on unique issues of the stock under consideration, and improve consistency in the treatment of common unknowns, uncertainties and data collection issues.

Workshop Objectives
1) Bringing Data Providers and Assessment Analysts together to discuss data and documentation needed to support assessment analyses, specifically data sources, quantity, and quality.
2) Reviewing past assessments to identify common or recurring data issues and document how they were addressed.
3) Identifying preferred solutions to common data issues and develop best practices recommendations for addressing those issues in the future
4) Recommending best practice approaches for data preparation and analysis for future assessments, including procedures to follow when deviating from best practices recommendations.
5) Identify process to address future revision and evaluation of workshop recommendations and Best Practices.

6) Consider and evaluate the creation of a standing data methods working group to address future data best practices issues.

The final deliverable would be a workshop report listing common issues by work group, potential solutions, and when possible, recommend and justify best practice approaches for dealing with common or recurring data issues.

Workshop Terms of Reference
1) Develop inventory of SEDAR Data Workshop datasets and common or recurring data and analysis issues and identify issues to be discussed during the workshop process. (NOTE: This ToR will be addressed during the planning stages of the workshop using the focus group approach and/or by the Organizing Committee.)
2) Review past assessments and document how the identified data and analysis issues were addressed in the past. Identify and document potential additional methods to address these issues. (NOTE: This ToR will be addressed prior to the workshop, so the information is available to address the other ToRs during the workshop.)
3) Select data and analysis issues and develop best practices procedures and approaches for addressing those issues in the future.
4) Recommend best practice procedures and approaches for data preparation and analysis for future assessments, including procedures and approaches to follow when deviating from best practices recommendations.
5) Identify process to address future revision and evaluation of workshop recommendations and Best Practices, considering all unaddressed data issues and the possible creation of a standing data methods working group.
6) Prepare a SEDAR Procedural Workshop report addressing workshop recommendations and decisions that will be used to guide future SEDAR assessments.

Time and Place
The workshop will be held the week of June 22nd, 2015 in Atlanta, GA.

Planning and Organization
An organizing committee will be convened to refine workshop objectives, develop Terms of Reference, identify potential participants, identify briefing materials and necessary advance prep work, and discuss workshop approach and timing. The role of procedure workshop organizing committees is administrative and planning.

Organizing Committee:
- SAFMC – Marcel Reichert
- GMFMC – John Froeschke
- CFMC – Rich Appeldoorn
- HMS – Karyl Brewster-Geisz
- SEFSC – Shannon Cass-Calay, Dave Gloeckner, Erik Williams, Steve Turner

- GSMFC – Donna Bellais
- ASMFC/ACCSP – Julie DeFilippi
- SEDAR Staff – Julia Byrd, John Carmichael, Julie Neer

Advance Prep Work

To ensure a productive meeting, work will need to be done in advance of the in-person workshop including, development of an inventory of Data Workshop datasets and common data issues; prioritization of the data issues and identification of the issues to be discussed at the workshop, perhaps also identifying issues that could be handled via webinar prior to the meeting, with just review at the workshop; review of how the identified issues were handled in past assessments; and development of briefing materials.

A focus group approach will be used to develop the inventory of Data Workshop datasets and common data issues. Each focus group (commercial, recreational, indices, life history, and catch at size/age) will be responsible for the following tasks:

1) Develop an inventory of SEDAR Data Workshop datasets and common or recurring data issues
2) Prioritize the identified data issues (e.g. most bang for buck)
3) Identify the issues where best practices recommendations could potentially be developed on a webinar vs. in-person workshop (e.g. issues with straight forward solutions)

An initial webinar will be held with all focus group members to give a general overview of the workshop objectives and explain the focus groups' specific tasks. Subsequent webinars will be held for each focus group with past work group leaders, key data providers, and assessment analysts to complete the identified tasks. Focus group participants by work group are below.

Life History
- Recent WG leaders: Jennifer Potts, Robert Allman, Gary Fitzhugh, Marcel Reichert, Trey Driggers, Adyan Rios, Doug Devries, Joey Ballenger, Linda Lombardi,
- Other key data providers: Will Patterson, John Carlson, David Wyanski
- Assessment Analysts
  - Beaufort: N/A
  - Miami: Jeff Isely
  - Other (Panama City or FWC?):

Commercial
- Recent WG leaders: Neil Baertlein, Dave Gloeckner, Kevin McCarthy, Alan Bianchi, Heather Balchowsky Baertlein
- Other key data providers: Julie DeFilippi, Donna Bellais, Steve Brown, Graciela Garcia-Moliner/Roy Pemberton, Jessica Stephen, Stephanie McInerny, Amy Dukes, Daniel Matos, Julie Califf, Liz Scott-Denton
- Assessment Analysts
  - Beaufort: Kate Siegfried
  - Miami: Shannon Calay
  - Other (Panama City or FWC?): Enric Cortés

Recreational
- Recent WG leaders: Ken Brennan, Vivian Matter, Jeff Isely, Heather Balchowsky Baertlein
- Other key data providers: Kelly Fitzpatrick, Beverly Sauls, Chris Wilson, Graciela Garcia-Moliner, Eric Hiltz, Kathy Knowlton, Gregg Bray, Tom Sminkey or John Foster (MRIP representative), Daniel Matos
- Assessment Analysts
  - Beaufort: Kevin Craig
  - Miami: Adyan Rios
  - Other (Panama City or FWC?): Enric Cortés

Indices
- Recent WG leaders: Walter Ingram, Adam Pollock, Kevin McCarthy, John Carlson, Cami McCandless
- Other key data providers: Joey Ballenger/Tracey Smart, Eric Fitzpatrick, Rob Cheshire, Ted Switzer
- Assessment Analysts
  - Beaufort: Kyle Shertzer
  - Miami: Shannon Calay
  - Other (Panama City or FWC?):

Catch by size/age (new group)
- Key data providers/analysts: Ching Ping Chih, Eric Fitzpatrick, Rob Cheshire
- Assessment Analysts
  - Beaufort: Kyle Shertzer
  - Miami: Meaghan Bryan
  - Other (Panama City or FWC?): Dean Courtney or Enric Cortés

After focus group webinars are complete, SEDAR will compile a master Data Issue Inventory. The Organizing Committee will review this list and develop a workshop plan of attack – identify issues to handle via webinar vs. in-person workshop; determine which issues can be discussed at this workshop and if additional workshops are needed; discuss workshop structure and additional prep work that needs to be done before the workshop.

Workshop Approach
TBD – needs further discussion by organizing committee.

Participants
TBD. Potential participants will likely include members from Council SSCs, Commission Technical Committees, SEFSC, ACCSP, State Agencies, and SEDAR staff. Focus group members will not necessarily be workshop participants. However, there will likely be substantial overlap between these two groups. It may also be helpful to have independent experts with statistical expertise attend the workshop. Participants will be appointed by the Cooperator with which they are affiliated.