



# SEDAR

## *SouthEast Data, Assessment, and Review*

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### SEDAR Steering Committee

### Projects Report

October 2014

#### **Recently Completed Projects**

##### SEDAR 37 FL Hogfish Benchmark

**Coordinator:** Julie Neer

**Progress summary: Completed.** FL FWCC was the lead on this assessment. Due to a few issues compiling the data and finalizing the assessment, it went out for CIE desk review a bit later than originally scheduled (July 2014 vs. April 2014)

The final stock assessment report, along with the CIE reports, was distributed on 11 September 2014. The Gulf Council SSC will review the report at its early October meeting, and the South Atlantic SSC will review it at their late October meeting.

##### South Atlantic Update – Gag Grouper

**SEDAR Contact:** Julia Byrd

**Progress summary: Complete.** The assessment was reviewed and accepted by the SAFMC SSC in April 2014.

##### SEDAR Procedural Workshop 6: South Atlantic Shrimp Data Evaluation

**SEDAR Contact:** Julia Byrd

**Progress summary: Complete.** The SEDAR Shrimp Procedural Workshop was held July 22-24, 2014 in North Charleston, SC. The final report will be available mid-September 2014.



## **Projects in Progress**

### **SEDAR 35 CFMC Red Hind Benchmark**

**Coordinator:** Julie Neer

**Progress summary: Underway.** The SEDAR 35 Caribbean red hind Data Workshop was originally scheduled for October 9-11, 2013 but due to the government shutdown, was not held. The entire project timeline was shifted to accommodate this issue, with the Data Workshop rescheduled for March 11-13, 2014, and the assessment webinars being held between May-July 2014.

During the assessment webinar process the SEFSC, in conjunction with the Caribbean Council, requested that a CIE desk review be conducted in lieu of the Review Workshop originally scheduled. SEDAR and the CIE were able to accommodate this request and the CIE desk review of the assessment is currently underway. It is scheduled for completion on 30 September 2014, and it is anticipated that the final Stock Assessment Report will be available in October 2014.

### **SEDAR 38 King Mackerel Benchmark**

**Coordinator:** Julie Neer

**Progress summary: Complete.** The Review Workshop was held August 11-15, 2014, and the Review Workshop report was received on 8 September. The final Stock assessment report is currently being compiled and will be disseminated shortly. The South Atlantic Council SSC will review the assessment at its late October meeting. The Gulf Council SSC had planned on reviewing the assessment at its early October meeting but due to a conflict with ICCAT responsibilities, the lead analyst would not be available. The Gulf Council SSC will be reviewing the assessment at its January 2015 meeting.

### **SEDAR 39 HMS Smoothhound Sharks**

**Coordinator:** Julie Neer

**Progress summary: Underway.** The Data Workshop was held May 19-23, 2014 in Charleston, SC. During the workshop, it was determined that two assessments would be conducted: one for smooth dogfish (*Mustelus canis*) in the Atlantic, and one for the smoothhound complex that exists in the Gulf of Mexico.

The assessment webinars are currently underway. The Review workshop is scheduled for February 10-12, 2015 in Panama City, FL.

## SEDAR 40 ASMFC Menhaden (Review Only)

**Coordinator:** Julia Byrd

**Progress summary: Planning.** The SEDAR 40 Atlantic Menhaden Review Workshop will be held December 9-11, 2014 in Atlantic Beach, NC. The final Stock Assessment Report will be available to the Commission in January 2015.

## SEDAR 41 South Atlantic Red Snapper and Gray Triggerfish

**Coordinator:** Julia Byrd

**Progress summary: Underway.** At its June 2014 meeting, the SAFMC approved a compressed timeline for SEDAR 41. The Data Workshop was scheduled for August 4-8, 2014; assessment process was scheduled as a combination of webinars and an in-person Assessment Workshop to be held November 18-21, 2014 in Morehead City, NC; and the Review Workshop was scheduled for March 17-20, 2015 in Atlantic Beach, NC.

The Data Workshop (DW) was held August 4-8, 2014 in Charleston, SC. Two Post DW webinars were held (August 15 and September 11, 2014) to finalize remaining data issues from the workshop. At the second Post DW webinar, the panel discussed an issue, accuracy in the early years of headboat data, which was raised in a working paper submitted after the DW (SEDAR 41-DW40; submitted 8/27/14). The Data Workshop panel noted the reports of inaccuracies in the headboat logbook program would potentially impact all species caught by the headboat fishery, not just red snapper and gray triggerfish, and could have impacts on all future snapper grouper assessments. The panel agreed that this was a serious issue that warranted further investigation and had a lengthy discussion on how this issue could be addressed for this assessment. The panel discussed many options but recommended stopping the SEDAR 41 assessments for both species to investigate the headboat misreporting issues, and delay both assessments until these issues are resolved. The length of the delay is unknown and will be dependent on the process used to resolve these issues. The DW panel also recommended that high priority be given to a workshop (or other means) to address this issue (could be a SEDAR Procedural Workshop).

## SEDAR 42 Gulf of Mexico Red Grouper

**Coordinator:** Julie Neer

**Progress summary: Underway.** The Data Webinar for this project is scheduled for 22 October 2014, and the Data Workshop is scheduled for 17-21, 2014 in St. Petersburg, FL. The assessment webinars will be held between March and June 2015. The Review Workshop is scheduled for July 14-16, 2015.

## Gulf of Mexico Update – Red Snapper

**SEDAR Contact:** Julie Neer

**Progress summary: Underway.** The data deadline of this update assessment was originally agreed to be 31 August 2014 by the SEFSC during the 2014 SEDAR Project Scheduling call. There is hope that revised MRIP numbers will be available by October 1 for inclusion in the update, however, that will depend on how quickly calibration methods can be developed and applied.

## MRIP Calibration Workshop II

**SEDAR Contact:** John Carmichael

**Progress summary: Underway.**

SEDAR assisted NOAA Fisheries MRIP staff in conducting the second MRIP calibration workshop, devoted to addressing changes in the Access Point Angler Intercept Survey (APAIS). The workshop was held September 8 – 10, 2014 in North Charleston, SC. Several calibration alternatives were identified for evaluation and application, with a goal of having preliminary calibration options available for inclusion in the upcoming assessments of Gulf red snapper and red grouper.

## Upcoming Projects – Planning Underway

### SEDAR 43 Gulf of Mexico Gray Triggerfish Assessment (standard-track)

**SEDAR Contact:** Julie Neer

**Progress summary: Planning.** The Terms of Reference and Project schedule have been provided to the Gulf Council for review and approval. The in-person workshop is tentatively scheduled for March 17-19, 2015 in Miami.

## Florida Black Grouper Update

**SEDAR Contact:** Julie Neer

**Progress summary: Planning.**

Little discussion has occurred at this point regarding this update assessment, other than the data deadline of 22 September 2014 has been agreed to by the SEFSC during the 2014 SEDAR Project Scheduling call. Since that call, FWC has had some staffing issues and as such, has pushed the data deadline back to late October 2014.

## South Atlantic Red Grouper Update

**SEDAR Contact:** Julia Byrd

**Progress summary: Planning.**

A data deadline of 22 September 2014 was agreed to by the SEFSC during the 2015 SEDAR Project Scheduling call. In June 2014 the Council was notified that staff turnover at SEFSC put this project on hold. While resolution was expected by the September 2014 SAFMC meeting, the delay of SEDAR 41 due to issues with the headboat data have again put this project on hold. The data deadline will have to be reestablished, although it is unlikely a new data can be set until after the headboat data issue is resolved.

**Data Methods Procedural Workshop**

**SEDAR Contact:** Julia Byrd

**Progress summary: Planning.**

This procedural workshop is requested by the analytical participants to develop best practices for data workshops. It will also consider creation of an expert working group on data which may serve as a standing committee to assist in developing consistent and technically sound resolution of data issues. The Steering Committee needs to approve goals and objectives and an organizing workgroup for the workshop.

**SEDAR Procedures Workshop 7**  
**Data Best Practices**  
**DRAFT WORKSHOP WORKPLAN**  
Steering Committee Review, October 2014

**Description**

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.

**Workshop Need and Goal**

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.

The goal of this workshop is to identify common and successfully peer reviewed decisions and recommendations of SEDAR data and develop best practices guidelines to help support and streamline such decisions for future assessments. Preliminary objectives include:

- 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 developing best practices recommendations for addressing those issues in the future
- 4) Considering standards for minimum acceptable data levels for various categories of assessment analysis. (*Maybe this is better for the assessment workshop?*)
- 5) Proposing best practice approaches for data preparation and analysis for future assessments, including procedures to follow when deviating from best practices recommendations.

The final deliverable will be a workshop report listing common issues and proposed solutions by work group, and, where appropriate, recommending and justifying best practice approaches for dealing with common or recurring data issues.

*Steering Committee Guidance:*

- Support the goal of developing best practices to address common, recurring data issues?
- Review preliminary objectives

## Time and Place

The workshop was tentatively scheduled for Spring 2015; dates and location TBD.

*Steering Committee Guidance:*

- Location: Charleston will be the most economical; alternative is Atlanta, most convenient considering all participants.
- Is spring 2015 still a realistic timeframe for this workshop?

## Planning and Organization

An organizing committee will be convened to refine workshop objectives, develop Terms of Reference, and identify potential participants. The role of procedure workshop organizing committees is administrative and planning, therefore they are typically limited to 6 – 8 participants.

*Steering Committee Guidance, Organizing Committee:*

- SEDAR Staff
- SEFSC
  - Assessment Leads
  - Data Leads (Catch, Life History, Indices)
- Other Key Data Representatives
  - MARMAP, ACCSP

## Participants

TBD. Potential participants will likely include members from Council SSCs, Commission Technical Committees, SEFSC, ACCSP, State Agencies, and SEDAR staff. Participants will be appointed by the Cooperator with which they are affiliated.

*Steering Committee Guidance:*

- # of SSC and state agency participants (presumed SEDAR travel funding)
- Cooperator staff participants and travel funding source
- Estimated SEFSC participants
- Workshop Chair? (past includes SEDAR staff, SSC reps, SEFSC reps)

# SEDAR Assessment Process Revision

## Steering Committee Review

October 2014

This document describes a revision to the SEDAR assessment process intended to streamline assessment development and improve the effectiveness of communication between the various participants on the assessment panel. Current application of the SEDAR process relies on numerous webinars and has become cumbersome and inefficient for all parties. Moreover, constituent representatives are actually participating less, citing the time commitment of the many meetings as excessive and intimidating.

Procedures proposed here do not deviate from prior guidance provided by the SEDAR Steering Committee. For example, the summary of the October 2007 SEDAR Steering Committee states the Committee recommended *“all analytical teams...shall be prepared to present a functioning model at the beginning of each assessment workshop, and that the analytical team should be encouraged to communicate with others on the assessment workshop panel via email or conference call as necessary to develop a functioning model.”*

Changes are required to achieve the SEDAR objective of increased participation and address the currently inadequate level of assessment throughput. The primary change proposed here is to clarify that those charged with developing the assessment may communicate as needed in order to reach TOR milestones. As a result, fewer meetings will be necessary. Meetings held will be scheduled to allow review of milestone events in assessment model development. The primary benefit of encouraging informal communication by the Analytical Team and Fishery Advisors is to allow the work to flow in a more efficient and logical manner, by recognizing that it is impossible to preschedule the process because it is impossible to know at what stages challenges and issues will arise. Desired benefits from reducing the number of meetings during assessment development include providing more time for Analytical Teams to conduct their work, easier scheduling and a more attractive commitment for Fishery Advisors, and greater and more effective participation during the meetings.

### I. Assessment Process Participants

No change in participants or the appointment process is suggested. The current "Assessment Workshop Panel" name is changed to "Assessment Working Group", to reduce confusion with the current name, particularly since assessment workshops have been replaced by the more involved and extensive "assessment process". It is also hoped that use of the term 'working group' better reflects the function and operation of the group. The following are typical participants in the SEDAR assessment process.

1. Assessment Working Group (AWG): Consists of the Analytical Team (scientists from the lead agency responsible for conducting analyses) and Science Advisors (e.g. SSC and other Cooperator technical appointees)



2. Fishery advisors (FA): constituent representatives appointed by the Cooperator based in knowledge of fishery practices and the stock.
3. Observers/Attendees: Members of the public and other attendees who are not appointed by a Cooperator to one of the groups named above in #1 and #2.

## II. Assessment Charge (Terms of Reference):

No change is proposed. Consistent with current practices, the process will be guided by Terms of Reference (TORs) approved by the appropriate SEDAR Cooperator (Cooperator refers to the agencies and organizations engaged in the SEDAR process and represented at the SEDAR Steering Committee, as defined in the SEDAR SOPPs).

## III Assessment Process Approach: Assessment product development

It is proposed that the assessment process be conducted very similar to current data workshop process, being centered around working groups that prepare information for discussion during plenary sessions. The primary differences are logistical. The assessment process will take place over an extended period of time rather than the week devoted to the data workshop; there will typically be a single working group, the Assessment Working Group (AWG) described above, rather than the many groups convened for a data workshop; and the plenary sessions will be conducted as public meetings or webinars, scheduled in advance and occurring over a 2 to 3 month window

Assessment working groups and advisors will communicate informally and as needed, throughout the assessment process, to do the pre-decisional work necessary to develop assessment products that address the TORs and will be discussed through public plenary meetings (held as a webinar or workshop) at key points (milestones). Technical issues will be discussed by the AWG, while fishery and fishery data related issues that arise will be posed to the Fishery Advisors (FA). The intent is to allow the assessment working group to efficiently reach the important model development milestones while still preserving the public involvement that is a cornerstone of the SEDAR process. Plenary meetings will be scheduled in advance through the assessment planning process, and will be conducted and noticed in accordance with normal SEDAR meeting requirements.

## Proposed Milestones.

Each milestone represents a public meeting, held either in-person or via webinar, and subject to all the administrative requirements of SEDAR (Council) activities. At each milestone meeting, the AWG and FA will review progress on the project TORS, considering alternatives and recommendations developed by the assessment workshop panel. Meeting outcomes will be consensus recommendations of the AWG to guide further model development and address TORs. The descriptions below are generalized, intended to apply across the range of SEDAR circumstances. In some cases not every item listed under a milestone will be required. For example, the continuity run referenced in Milestone 1 will not apply to first time benchmark assessments.

Milestone 1. Continuity run completed, identify model alternatives and issues

- Review continuity run results and approve continuity model
- Consider methods and configuration options for base model
- Recommend assessment methods (i.e., model classifications and packages) to pursue for base model consideration
- Identify likely issues to be addressed and evaluated in developing the base model
- Review and finalize any data changes or modifications since the DW

Milestone 2. Base model approved

- Review base model alternatives and recommend base model approach and configuration
- Recommend sensitivities and uncertainty evaluations
- Recommend projection approaches and configuration
- Address any additional issues related to the model and approach as necessary

Milestone 3. Assessment model complete; final review and approval

- Review sensitivity and uncertainty evaluations
- Review projection results
- Review assessment report and responses to TORs

IV. Product: Stock assessment report section of the overall SEDAR assessment report.

No change is suggested to this component.