

SEDAR Data Best Practices Standing Panel: Webinar Summary

July 27, 2017 from ~1-2:15pm (EST)

Attendees

- Panel members: Donna Bellais, Karyl Brewster-Geisz, Shannon Calay, Gary Fitzhugh, Jeff Kipp, Steve Turner, Erik Williams
- Staff: Julia Byrd, John Carmichael, Julie Neer
- Other attendees: Rusty Hudson, Beth Wrege

Housekeeping/Updates

- SEDAR Steering Committee fall in-person meeting: Sept 26-27, 2017 in Charleston, SC; will also be broadcast via webinar - webinar registration will be available on the SEDAR website once the date gets closer

SEDAR MANAGEMENT HISTORY TEMPLATE

Background: In fall 2016, SEDAR Coordinators became aware that different Excel management history templates were being used for SEDAR projects (see Attachments 1a and 1b). June 2015 Data Best Practices Workshop initially recommended an Excel management history template that contained two worksheets summarizing commercial and recreational federal regulations (see Attachment 1a). Additionally, a different template was developed by SEFSC staff and has been used for Gulf of Mexico assessment projects that contains multiple worksheets organized by topic (gears, spatial closures, possession limits, size limits, etc. – see Attachment 1b).

On the March 2017 Standing Panel webinar, SEDAR Coordinators asked Panel members to consult with individuals within their lab who participate in SEDAR Data Workshops (especially those that develop fishery dependent indices and/or bycatch estimation) to help determine which template is preferred.

- Panel quickly reviewed management templates (attachments 1a and 1b)
- South Atlantic and HMS prefer template 1a (organized by sector – commercial & recreational)
- Gulf of Mexico and Caribbean prefer template 1b (organized by topic)
- Panel member noted that Caribbean/GoM may be able to use either template as long as the information in attachment 1a can be used in pivot table to look at regulations by topic rather than sector
- Panel member emphasized the need for the information included in the management history docs to be correct, especially the effective dates for new regulations; in some regions information in Excel spreadsheet being used directly in code used to develop FD indices
- SEDAR staff noted that Council staff typically develop mgmt. history docs and SERO staff review docs before they are finalized; SEDAR staff will try to emphasize importance of ensuring information in these documents is correct
- Panel briefly discussed whether it would be problematic to use different mgmt. history templates for different regions; from SEDAR staff's perspective – this isn't necessarily a problem as long as it is clear which template each group wants to use; can follow up with Council

staff/SERO to see if this creates hardship for them; may also be helpful to follow up with Steve Turner about this – since his personnel typically participate in all SEDAR assessments

- Panel members noted the need to include federal and state regulations in management history docs in similar format; currently in the South Atlantic the Excel doc only has federal regulations, state regs are provided in a different format in PDF mgmt. history document; noted that it may be difficult to incorporate all state and federal regulations into one Excel document using the current templates
- J. Kipp noted that ASMFC typically incorporates state regulations into their management history tables; use template similar to attachment 1a and add additional columns for state regs; mgmt. history tables used in assessment report, not pulled directly into code; typically only add regulations into table when changes made (not include every year they are in place)
- **RECOMMENDATION:** SEDAR staff will use the following templates for each region unless further discussion indicates a change is necessary
 - South Atlantic and HMS will use template 1a (organize by sector)
 - Gulf of Mexico and Caribbean will use template 1b (organize by topic)
- **ACTION ITEMS:**
 - **J. Kipp** – send ASMFC management history template to Panel (DONE)
 - **S. Calay** – follow up with staff to determine if template 1a will work for their needs
 - **J. Byrd** – work on template to incorporate state regulations into Excel template using cobia as example

PRIORITIZING NEXT ISSUES FOR SEDAR BEST PRACTICE PANEL TO ADDRESS

Background: At the March 2017 Standing Panel webinar, feedback received on Data Best Practices was shared with Panel members. At this time, the majority of feedback was provided through the SEDAR 50 (Atlantic Blueline Tilefish) project. After reviewing this information and further discussion, the Panel decided it would be best to delay prioritizing the next Data Best Practice issues to address until feedback was received from additional SEDAR projects (SEDAR 48: Southeastern Black Grouper and SEDAR 51: Gulf of Mexico Gray Snapper).

Attachment 2 contains excerpts from the SEDAR 48, SEDAR 50, and SEDAR 51 Data Workshop report sections with data best practice feedback. The language in this document is verbatim to what was provided in the Data Workshop Reports. In Attachment 3, SEDAR staff summarized data best practice feedback received to date. This document has more details than Attachment 2.

At its March 2017 meeting, the Panel also briefly discussed the approach for identifying the next SEDAR data best practice issues to address. Panel members suggested potential criteria that could be used to help prioritize issues and noted there were still a number of topics in the Data Issue Inventory where Best Practice recommendations have not yet been developed. SEDAR staff developed a survey for Panel members to rank these issues as high, medium, or low priority. The suggested issue prioritization criteria and issue prioritization survey results are found in Attachment 4 to assist in the Panel's discussion.

- Panel walked through Attachment 3 and Attachment 4; key points from the group’s discussion are highlighted below; discussion has been divided into two sections: 1) feedback on current data best practices and 2) feedback on issues where data best practices have not been developed

FEEDBACK ON CURRENT DATA BEST PRACTICES

- **Data Process Timeline/Data Deadlines**
 - Panel member noted that that timeline may not need to be revised, but may need to discuss/develop consequences for when timeline not met
 - Original data process timeline developed for benchmark assessment; Panelists noted need to revise for Standard and Update assessments;
 - S. Calay and J. Neer are working to develop schedule/timeline for standard assessments in GoM; this could serve as template for Standing Panel to review; SEDAR staff will work together to ensure consistency between regions
 - Need to clarify what data deadlines in standard assessment schedule mean (assessment input vs. raw data)
- **Stock Boundary Timing & Resolution Process**
 - Need to identify what data needed for stock ID workshop/webinars and the timeline necessary for getting these data; group acknowledged that much of the data would likely be preliminary for stock ID discussions; may need to incorporate stock ID workshop data deadlines into overall process timeline
 - Panel members supportive of holding Stock ID workshop with appropriate personnel (could include mgmt) prior to Data Workshop; important to have stock ID decision made early in process (prior to DW) so that participants are able to compile and analyze data accordingly
 - Panel feels that the Stock ID process laid out by the Steering Committee (holding a stock ID workshop followed by multiple reviews - independent review, SSC review, etc.) is too cumbersome; stock ID decision is part of the overall assessment process and stock ID recommendations should be reviewed as part of the final assessment review as part of the RW
 - Concern that Stock ID resolution process is very lengthy, adding additional time and resources from SEDAR workshop participants which is not currently built into the planning schedule; independent review could also pose challenges if not able to follow recommendations based on data structure, etc.
 - Noted managers should provide the unit boundaries needed for catch advice at the beginning of the Stock ID process (prior to workshop) – so that information can be incorporated into the process and the assessment output can provide the appropriate catch advice needed for management
 - Panel felt the Stock ID decision should be made in the context of the assessment and rely on the science; decision should rely on biology, connectivity/population dynamics, data structure, etc.
 - **ACTION ITEMS:**
 - Consider adding Stock ID workshop data deadlines to Data Process Timeline

- **SEDAR Staff:** will share Standing Panel’s input on Stock ID Resolution Process with SEDAR Steering Committee at Sept 2017 meeting
- **Data Quality in MRFSS/MRIP Datasets**
 - Seems to be larger issue in South Atlantic than in other regions
 - Need to work with MRIP staff to develop definition of outlier (e.g. identify metrics) and develop standardized methods to address when outliers identified; this isn’t under the purview of the Standing Panel – it needs to be resolved at a broader scale
 - Current Data Best Practice sufficient until broader issues resolved; DW report will provide table with the raw data and background information; secondary table of alternative estimates can potentially be provided if requested; alternative approach identified on case by case basis based on DW Panel input
 - Support workshop/larger process with SEFSC, MRIP, SSC, etc. representatives to help resolve broader issue of defining outliers and developing standardized methods to address
 - **ACTION ITEMS:**
 - **SEDAR staff:** will share Standing Panel’s support for workshop/larger process to address MRIP data quality/data outliers with SEDAR Steering Committee
- **Uncertainty Estimates for Commercial Landings** – Panel didn’t feel this issue was currently a priority to resolve
- **DW Report Chapters: Content & Format**
 - At 2015 Data BP workshop indices work group (WG) developed streamlined DW report outline & working paper templates
 - Panel felt didn’t need to develop streamlined outlines for each WG - instead SEDAR Coordinators can help point WG to indices examples; can also reiterate to DW Panels that DW reports should focus on discussions/decisions more than background information; background information can be contained within working papers and simply referenced in DW reports
 - Caution against streamlining too much – need to make sure all relevant information included in DW report (issues, options discussed, data decisions with justification; details on analyses, etc. can be included in working papers)
 - GoM Assessment Team noted exploring developing living document for data treatments, analyses, etc. for GoM assessments; may be helpful to initiate communication with Councils to determine what information they would like included up front within assessment reports

FEEDBACK ON ISSUES WHERE DATA BEST PRACTICES HAVE NOT BEEN DEVELOPED

- Group briefly reviewed draft prioritization criteria and survey results (Attachment 4); Panel members felt that many of the issues included in the survey were all part of a broader communication and data compilation issue; many Panel members noted need to address these larger communication and data compilation issues before address some of the other issues included in survey

- ‘Hunting and gathering’ data for SEDAR assessments has become a full time job for SEFSC staff; don’t currently have personnel to efficiently do this; need to have coordinator(s) within SEFSC to identify, format, compile data for assessments; data compilation issue seems to be larger, more complex in Southeast than anywhere else in country
- Late changes to SEDAR schedule exacerbate this issue; changing schedule is external to Data Best Practice Standing Panel and to SEDAR staff, but need to continue emphasizing how late changes to schedule are difficult to accommodate and will likely end up decreasing throughput
- SEDAR Data BP have tried to address data delays – have developed Data Process Timeline; however data deadlines still being missed; not sure what else can do to address this through Data BP – no real way to apply consequences
- Panel member noted think SEFSC data compilation processes improving; have only gone through few iterations with Best Practice timeline - likely going through growing pains and will need additional time to see more improvements (will get better idea of what workload able to handle with existing staff, have more time to make data processes more efficient, etc.)
- May need to reconsider how assessments are being done if throughput the biggest priority; current process doesn’t seem to facilitate increased throughput in large part due to time consuming data compilation and not having enough staff to support this component of the process
- **ACTION ITEMS:**
 - **SEDAR staff:** will share Panel’s concerns about broader communication & data compilation issues with SEDAR Steering Committee
 - Group identified two issues to work on during the upcoming months
 - **S. Calay & J. Neer:** Development of standard data process timeline:
 - **NEED TO IDENTIFY LEAD:** Late Data Delivery – identifying critical bottlenecks and developing decision tree on how best to handle late data delivery

Next Meeting

- **Next Standing Panel webinar will be in Jan/Feb 2018;** will discuss any feedback from SEDAR Steering Committee on Stock ID Process and broader data compilation issue identified by Panel; update/present progress on standard data process timeline and late data delivery decision tree
- Julia will send doodle poll in the upcoming months to select date/time for next webinar