

# **SEDAR**

## **SouthEast Data, Assessment, and Review**

*South Atlantic Fishery Management Council  
Gulf of Mexico Fishery Management Council  
Caribbean Fishery Management Council  
NOAA Fisheries  
Atlantic States Marine Fisheries Commission  
Gulf States Marine Fisheries Commission*

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### **SEDAR Steering Committee**

**February 1 – 2, 2005**

#### **Discussion Overview**

##### Agenda Items:

##### **I. Introductions**

##### **II. Approval of Agenda and Overview of Materials**

##### **III. Approval of April 7, 2004 Minutes**

**(attachment 1)**

##### **IV. Update on Recent Activities**

A. Overview: John Carmichael

###### **SEDAR 7 Gulf Red Snapper**

The SEDAR 7 Data Workshop was held April 19 – 23 in New Orleans. Overall it was a resounding success. Many new participants were brought into the process and an enormous amount of data was assimilated. I attribute the success to thorough advance preparation and data compilations and the team approach that was initiated several weeks before the workshop. The data report was on time and very well received, and this can be attributed to the effort of the team leaders both before and after the workshop in preparing the sections and the effort of Scott Nichols to put it all together.

The SEDAR 7 Assessment Workshop was held August 16 – 20 at the SEFSC. The assessment was not completed. Issues raised by the workshop panelists were too numerous and complex to be adequately addressed by the analytical team within the scheduled week. The Panel reached a preliminary consensus that no one individual model could adequately overcome the deficiencies of the input

data. The Panel agreed to develop a report that presents several models to illustrate critical uncertainties and provides basic, sound advice on stock status.

The second assessment workshop was held December 14 – 17, 2004 in Miami. The panel reviewed numerous model alternatives: Updated ASAP configuration from previous assessment, alternative ASAP configurations, various VPA formulations, SRA (stock-reduction analysis), and a spatially-explicit age-structured model. Also considered were various data time-series alternatives to provide additional contrast and several alternatives regarding the age of compensation. The panel ultimately decided the spatial-age structured model provided the best method of analyzing the available data and addressing the biological assumptions. The panel reached consensus on a base configuration and several sensitivity analyses were identified, results of which were only reviewed preliminarily at the workshop due to the long running time required for the model.

The review workshop is scheduled for April 4 – 7 in New Orleans LA. (See detailed schedule for information)

#### SEDAR 8 Caribbean Spiny Lobster, Yellowtail Snapper

The SEDAR 8 Data Workshop was held December 6-10 in St Thomas. Although participation was less than desired, Caribbean agency representatives were on hand for most of the meeting. A major data validation in St Thomas is nearing completion, which led to the discovery prior to the workshop of additional datasheets not included in TIP or the general canvass. SEFSC staff remained in St Thomas following the workshop to catalog the new data. The magnitude of the overlooked data was not as large as originally feared, and efforts are now underway to enter them into the appropriate databases in time for the assessment workshop.

The SEDAR 8 Assessment Workshop will be held March 14 – 18 in St Croix. As of January 13 participants were not named.

The SEDAR 8 Review Workshop will be held May 16 -20, San Juan , Puerto Rico. This review workshop will also address SA-GOM spiny lobster.

#### South Atlantic-Gulf of Mexico Spiny Lobster

FMRI accepted the Steering Committee's offer to take lead on this assessment and is conducting the workshops. They are following the SEDAR format and have been provided the SEDAR report outline and general terms of reference. SEDAR staff has assisted with naming participations and provided liaison to the Councils.

The Data workshop will be held January 25-27 in Marathon. The South Atlantic and Gulf of Mexico Councils provided travel orders for participants from the Council, AP's and SSC's.

The Assessment workshop will be held March 14 – 18 in Marathon FL. FMRI requests that the SEDAR partners provide travel orders for additional participants with stock assessment expertise. They are especially interested in securing

international experts, such as someone from Australia with specific spiny lobster experience.

#### Response to request for information – NER Coordinating Council

The Steering Committee requested a report on the operational procedures of the Northeast Coordination Council, the cooperative group that coordinates management and assessment planning between NOAA Fisheries NERO and NEFSC, the Mid-Atlantic and New England Councils, and the ASMFC. There is interest in having a comprehensive committee of this sort in the southeast. I contacted Harry Mears in the NERO for information on the Council. The response is summarized here.

Two of the annual agenda items of the NRCC are:

- 1) a matrix of upcoming fishery management actions (FMP's, amendments, addenda, fishery specifications, etc) for the two Councils, ASMFC, and NMFS. This gives some idea of upcoming workload and priorities as well as ways to leverage needed resources; and
- 2) a discussion of upcoming species stock assessment workshops for the next 36 months.

In addressing these items, there is some integration between fishery research and management issues important to the various partners.

There is no dedicated staff. Partner informally rotate administrative duties for the meetings and rely on volunteer efforts.

Activities of the Council are not formally part of Council SOPs.

#### National Interest: Pacific Islands and HMS

Gerard Dinardo of the Pacific Islands Science Center attended the SEDAR 4 Review workshop and the SEDAR 7 Assessment workshop to observe the process. The Center is interested in developing a peer review process for stock assessments and is looking at SEDAR as one example.

I presented an overview of SEDAR at the HMS offices in Silver Spring. They are interested in a SEDAR style process for future assessments, most notably a coming assessment of sharks. One concern is finding participants for all the workshops- HMS does not have the type of technical bodies that the Councils rely on (i.e. the SSC and other assessment and technical committees)

B: Action: Committee

## **V. Review Southeast assessment priorities (Attachment 2)**

### **A. Overview: John Carmichael**

#### **1. Current Schedule (From Appendix F, Sedar Guidelines)**

##### **1. SEDAR Benchmark Assessment List**

SEDAR #	SPECIES	Year	Status July 2004
1	SAFMC Red Porgy	2002	FINAL
2	SAFMC Vermillion Snapper/Black Sea bass	2003	FINAL
3	SAFMC Yellowtail Snapper ASMFC Atlantic Menhaden / Croaker	2003	FINAL
4	SAFMC Tilefish, Snowy Grouper	2003/04	FINAL
5	SAFMC & GMFMC King Mackerel	2004	FINAL
6	FL (SAFMC/GMFMC) Goliath Grouper & Hogfish	2004	FINAL
7	GMFMC Red Snapper	2004	ONGOING
8	CFMC Yellowtail Snapper CFMC Spiny Lobster FL (SAFMC/GMFMC) Spiny Lobster	2004/05	PLANNING
9	GMFMC Vermillion/Greater Amberjack	2005	PLANNING
10	SAFMC & GMFMC Gag Grouper	2006	PENDING
11	SAFMC & GMFMC Gray Triggerfish	2006	PENDING
12	SAFMC & GMFMC Red Grouper	2007	SCHEDULED
13	CFMC Yellowfin Grouper, Mutton & Lane Snapper	2007	SCHEDULED
14	SAFMC & GMFMC King Mackerel	2008	TENTATIVE

##### **2. SEDAR Assessment Update Schedule**

Species	Benchmark SEDAR#	Scheduled for Update	Status
SA Red Porgy	1	2006?	Hold
SA Vermillion Snapper	2	2006	PENDING
SA Black Sea bass	2	2005	Ongoing

##### **3. Future Benchmark Priorities**

GMFMC	SAFMC	CFMC
Black Grouper	Red Snapper	
	White Grunt	
	Black Grouper	
	King Mackerel	

### **2. Requested Changes**

GMFMC : Red Grouper benchmark in 2005

SAFMC: Black Sea Bass and Vermillion Snapper Updates

Black Sea bass update is underway.

## **VI. SEDAR Procedures Issues**

### **A. Overview: John Carmichael**

## 1. Operations Committee Report (Attachment 3)

The SEDAR Operations Committee met via conference call on October 19, 2004. Specific recommendations are noted under the discussion for each issue in subsequent sections. Several issues not specifically discussed later are listed here.

### A. Nature and Scope of SEDAR

The issue was whether SEDAR should be the source of all assessment information for the region or primarily address major issues such as benchmark assessments.

The Committee recommended that SEDAR focus on benchmark assessments, that review methods and providing training should be the responsibility of other bodies (such as SSC's) and that the scope of SEDAR should be determined by the Steering Committee

ACTION: Clarify the scope of SEDAR

### B. Participation

The Committee recommends that appointments be made well in advance (6 months) of the data workshop, and that all workshop appointments be made at this time to ensure the appropriate expertise is available at the appropriate workshop.

### C. Workshop Chair

The committee recommends that for especially controversial issues the Steering Committee consider appointing a facilitator or independent chair

### D. Productivity and Workshop Conduct

Regarding report contents and the SEDAR outline, the Committee recommends that the level of detail required in the outline be maintained. The Committee recommends changing the name of the advisory report to "Assessment Summary", requiring the assessment team to prepare the summary, encouraging that it be drafted prior to the review workshop, and allowing editorial license to address post-review changes. The committee recommends that the summary be presented at the front of the assessment report and serve as an executive summary.

On improving distribution of basic datasets to workshop participants, the committee recommends that an initial call for data be made well in advance of the workshop and that appropriate reminders of data formats and data needs be included.

Regarding the need to maintain participant's involvement in editing the final assessment report, the committee supported several recommendations: ensure that all workshop participants have an opportunity to review the final documents, encourage email collaboration

with participants following the workshop if errors arise or edits are required, and allow ample time between the AW and RW so deadlines can be reasonable.

Regarding the general timing of workshops, the committee recommended minimum times between workshops of 8-10 weeks between data and assessment workshop and 10-12 weeks between assessment and review workshops. The committee also suggested add scoping sessions, such as conference calls, with the analytical team and workgroup leaders to identify issues.

#### E. Data Submission

The Committee recommends standardizing file formats and software for data submission.

**ACTION:** The Steering Committee should reject, modify, or endorse the recommendations.

#### 2. Assessment update process (Attachments 4 and 5)

The SAFMC SSC discussed this issue relative to the need for an updated black sea bass assessment, and passed a motion providing specific guidance for updates of SAFMC assessments, with the intent that the recommendations apply to updates for SAFMC assessments and do not infringe in any way upon the other Council's SSC's to develop similar guidelines. Following the SSC meeting, Mike Prager and Doug Vaughan of the SEFS Beaufort Laboratory provided a memorandum offering an update procedure based on discussions of both the Operations Committee and the SSC.

The Operations Committee discussed the update procedure in detail. A primary point of contention was the degree to which changes in methodology can be accommodated within an update. The Committee recommended that update assessments only allow adding new datum to existing data series and not allow any methodological changes; that no restrictions be placed on who may conduct an update assessment; and that update assessments be prepared through a SEDAR workshop format, and that shortened workshops or combined data-assessment workshops are preferable to the previous system where one analyst did the work alone.

Several issues require attention and action:

##### i. Independence of Review:

One issue that needs particular attention is the nature of review for assessment updates. Although the SAFMC SSC did not address independent review, the issue was raised on a conference call in preparation for the black sea bass update. The SSC motion indicates that the SSC will establish the parameters for the update and provide review. Under SEDAR some consideration could be given to an independent

review. Possibilities include requesting that the CIE conduct an independent peer review (not a workshop format), requiring independent reviewers from the SSC (restricting some members for involvement in the update), providing additional independent reviewers when the SSC reviews the assessment, or conducting an abbreviated workshop-style review.

ii. Content of Update Report (Attachment 6)

There is a desire to prepare abbreviated reports to document assessment updates, rather than the complete report expected of benchmarks assessments as detailed in the SEDAR Assessment Report Outline. The update report can cite the previous assessment for much of the documentation and thus focus on the changes between the benchmark and update. However, the Steering Committee should consider whether or not it is acceptable to provide an abbreviated list of tables and figures and provide some minimal standards that are considered acceptable.

**ACTION:** The Steering Committee should review the various proposals and provide guidance on the update procedure.

3. Completing assessments on schedule

Participants continue to complain that materials are received with too little preparation time.

Operations Committee recommendations:

The committee recommends that planning for workshops be started well in advance and appointments be made sufficiently in advance of the data workshop so that work can get started early and papers can be completed, that strict deadlines not be established, and that conference calls between the SEDAR Coordinator, workgroup leaders, and lead analysts be held to identify issues prior to the workshop and develop a strategy for addressing them.

On the issue of conducting 2 assessment workshops, the operations committee recommends maintaining the current single AW approach.

Regarding the issue of conducting basic modeling work prior to the assessment workshop, the operations committee recommends that collaboration be conducted with the entire AW through email, name AW participants at the same time as DW participants and have them attend the DW, and generally coordinate the model preparation informally.

**ACTION:** The Steering Committee should review the draft general timing of workshops and endorse specific deadlines for report preparation and materials distribution.

3. Improving data evaluation (Attachment 7)

The Terms of Reference require evaluation of input data. Review panels have noted that this TOR is either seldom satisfied or seldom adequately addressed in the assessment report. The wording of the TOR has also required additional explanation at the review panels.

Operations Committee recommendations: the committee recommends that the purpose statement and guidelines for the DW be modified to indicate that basic data preparation be completed prior to the workshop. The Committee also recommends requesting data be submitted 1 month in advance, providing guidance on formatting requirements, and examples of basic exploratory work that should be completed prior to the workshop.

**ACTION:** The Steering Committee should consider providing some guidance as to the intent behind this term of reference.

#### 4. Writing responsibilities

Earlier SEDAR assessments have suffered some confusion and inconsistency in determining who is responsible for actually writing the report. Much of the work is completed by the workshop participants but there needs to be an overall editor. Some expect that this person should be one of the appointed panelists, such as an SSC member or other participant. Others feel this task is the responsibility of the lead assessment agency.

Operations Committee recommendation: assign a chief editor for the data and assessment workshops.

**ACTION:** The Steering Committee should consider the Operations Committee recommendation and reject or endorse.

#### 5. Workshop Jobs

There are many tasks to be completed at each step of the SEDAR process. Currently jobs are assigned at each workshop. Standardizing required jobs and tasks and making assignments earlier may help prevent surprises and ensure the participants approach workshops with realistic expectations.

Summary of typically assigned jobs.

##### *Data Workshop:*

Workshop Chair: Responsible for conducting the plenary sessions and ensuring workgroups meet task deadlines.

Workshop Rapporteur: Responsible for editing and compiling the report.

Workgroup Leaders: Responsible for leading workgroups, reporting to the plenary, and drafting their workgroup's report segment.

##### *Assessment Workshop:*



Data Review: Responsible for checking and verifying accuracy of input files

Code Review: Responsible for checking and verifying model code

Species Leader: Responsible to tracking plenary suggestions and decisions, drafting text during the workshop. Co-editor of report following workshop.

Lead Biologist(analyst): Lead for the assessment team, responsible for making model runs and presenting results to the group. Assumes lead writing duties following the workshop.

Operations Committee recommendation: assign data and code review responsibilities at every assessment workshop, assign a species leader at the assessment, and identify a lead analyst. (from above, rename ‘rapporteur’ as ‘editor’)

**ACTION:** The Steering Committee should review and consider endorsing the various workshop jobs and general assignment of responsibilities.

## 6. Research Recommendations

Each workshop panel in each SEDAR cycle develops research recommendations. Although these become part of the final report, there is no process for evaluating progress on the recommendations or for providing the recommendations to other outside researchers who may have the resources to address them. Further, each assessment to date includes requests for collection of additional basic data such as catch statistics, improved biological sampling, and expanded independent monitoring. There is no formal process in place for monitoring progress on such requests.

**ACTION:** The steering committee should consider a process to monitor, track, and distribute research recommendations.

## 7. Standard Projections

Future stock condition projection scenarios were originally included in the Terms of Reference for the assessment workshop. However, since it is difficult to determine appropriate projections before the status of the stock is determined, a request was made to remove specific projections from the Terms of Reference for SEDAR 4. Consequently, few projections were prepared during the assessment workshop and it took several additional months before a suite of projection results were presented to the Council. This is an ongoing area of confusion at the assessment workshops.

**ACTION:** The Steering Committee should determine whether specific projections should be required for each assessment.

Suggested Scenarios:

A) If stock is overfished:

$F=0$ ,  $F=\text{current}$ ,  $F=F_{\text{msy}}$ ,  $F=F_{\text{target}}$  (OY),

$F=F_{\text{rebuild}}$  (max that rebuild in allowed time)

B) If stock is overfishing

$F=F_{\text{current}}$ ,  $F=F_{\text{msy}}$ ,  $F=F_{\text{target}}$  (OY)

C) If stock is neither overfished nor overfishing

$F=F_{\text{current}}$ ,  $F=F_{\text{msy}}$ ,  $F=F_{\text{target}}$  (OY)

## 8. Standard Methods

Largely due to the paucity of data on SE fisheries resources, SEDAR assessments are often based on uniquely programmed models rather than the ‘canned’ models that are widely applied elsewhere. The reliability of such models is often not proven. Some assessment bodies require that unique models be tested on known data sets and include a comparison of results with existing models before they are accepted. The SEDAR TOR’s require that several models be considered.

Operations Committee Recommendation: Committee recommended that the TOR’s for assessment workshops not be changed to require specific models.

**ACTION:** The Steering Committee should consider whether the process for approval of unique models should be made more rigorous, and whether specific existing models should be required for each assessment.

## **VII. South Atlantic Black Seabass Update**

The SEFSC and SAFMC agreed to update black seabass in early 2005 rather than red porgy following identification of errors in projection outputs. The SAFMC SSC established general guidelines for the update (noted above).

Timing:

Presentation to SAFMC: June 13 – 17 2005

Completed report to Council for SSC review: April 22, 2005.

Report Content:

Due to the short time period in which to complete the update the analysts intend to provide an abbreviated report. The SAFMC expressed a concern that this could be interpreted as also including an abbreviated set of tables and figures. The Council expects the update to completely document all input data, manipulations, and results in accordance with the standard SEDAR outline.

**ACTION:** Endorse, modify, or leave up to SAFMC-SEFSC.

## VIII. Administrative Responsibilities

### A. Overview: John Carmichael

Administrative responsibilities for all workshops are currently handled through the SAFMC. The SAFMC hired a dedicated SEDAR administrative assistant to keep track of the administrative record, provide workshop administrative support, and distribute information. The GMFMC hired a SEDAR/Travel coordinator, and it is my understanding that the GMFMC will handle the distractive tasks for GMFMC oriented SEDAR's beginning with SEDAR 9. The Steering Committee needs to agree on a process for allocating administrative (and perhaps other) responsibilities among the respective Councils to avoid duplication of efforts and expenses, and clearly identify the partner responsible for each task.

TASKS:	Suggestion
Meeting arrangements and Contracts	Lead Council
Travel Orders and Announcements	Lead Council
Participation requests	NMFS: SEDAR; Council:
Council	
Workshop Materials Distribution	SEDAR Staff
Housing of Official Administrative Record	SEDAR Staff
Workshop Administrative Support	Lead Council
Workshop Chair	SEDAR Staff
Workshop Rapporteur	Lead Assessment Agency
CIE request	SEDAR Staff
Final Report Distribution	SEDAR Staff

### B. Action: Committee

## IX. Budget Planning

### A. Overview: Nancy Thompson/John Carmichael

The SEDAR Guidelines state the following regarding budget responsibilities:

"Each Council covers the travel expenses for their Advisory Panel, Assessment Panel, SSC, Council, and Staff representatives. Participants from NGO's, the fishing community, and outside public and peer-reviewer travel expenses are paid through the administrative grant to the South Atlantic Council."

Since each Council is responsible for appointing workshop participants, this language creates a disconnect between the Council which is appointing individuals and the Council which is providing the travel funding. Although this issue has not yet been contentious, it has been confusing. The GMFMC has received a grant to cover the administrative costs and travel expenses, and chosen to provide the travel funding for all participants they appoint. This is perhaps the best solution to this problem. The current grant request does not include travel expenses for GMFMC participants for 2005 activities.

Proposal: Each Council submit a grant request to the SEFSC to cover its SEDAR expenses. These expenses could include travel for appointed participants, distractive costs (mailing and materials distribution), and meeting expenses.

B: Action : Committee

## **X. Update on Workshop Appointments**

A. Overview: John Carmichael

All partners have made great strides in the appointment process over the last year. This has made workshops run much smoother and reduced the number of schedule related complaints from participants. As always, however, there are some areas where improvements can be made.

### **1. Participant Requests**

I keep a running list of suggestions and requests received from workshop participants. These form the basis of issues to be addressed by the steering committee and operations committee.

- Inadequate notice of meetings: should provide least 2 months advance for participants. Likely participants would appreciate an even earlier 'heads-up'
- Inadequate review time for documents: workshop materials should be provided at least 2 weeks in advance of meetings.
- Panel membership: Some participants are not sure if they are part of the official workshop panel – are they appointed to be observers or participants.
- Distinction between the panel and the analytical team: this is largely an issue at the assessment workshop. By design the analysts are considered members of the panel at the assessment and data workshop. We have not been as formal in naming the science center participants at the AW as we have with the other participants.

### **2. FMRI request for travel support for an international expert, spiny lobster assessment workshop (Attachment 8)**

FMRI accepted responsibility for conducting an assessment of South Atlantic and Gulf of Mexico spiny lobster. The Councils and SSC provided travel support for SSC and Council participants for the Data and Assessment Workshops. A review will be conducted as part of SEDAR 8. Florida requests additional travel support to ensure adequate assessment expertise at the assessment workshop and provided a list of desired attendees. They are especially interested in securing international participation by experts with experience in spiny lobster assessment.

B. Action: Committee

Proposals

Workshop Notice: Preliminarily schedule all workshops in a cycle within 2 months of DW, provide to councils and NMFS for distribution to likely participants.

Materials: Hard deadlines that papers and report drafts be completed and provided to SEDAR and Council staff within 3 weeks of start of any workshop.

Members: Clarify panelists vs. observers. Resolve whether or not 'analytical team' members are official panelists. Formally name all panelists within 2 months of each workshop.

FL participation request for AW.

## **XI. Update on the Website**

A: Overview: John Carmichael

The webpage was initially housed on the SEFSC servers with access through the SEFSC homepage. An enhanced webpage offering considerable interactive possibilities was developed based on work for the coral program. Despite considerable programming effort the website is still not functional. Ensuring simple remote administration and user access has proven difficult. Extenuating circumstances such as a lack of 'bandwidth' and the active hurricane season added to the difficulties. SEFSC programmers and Larry Massey intend to travel to Charleston in January or February to either resolve the current problems or develop a new, simpler design. Also under consideration is housing a simplified website on a dedicated server at the SAFMC .

## **XII. Participation of Mexican Scientists.**

There is possible overlap of stocks in the gulf of Mexico with fisheries in Mexico and the SEFSC recognizes the need to include Mexican data in SE assessments. Larry Massey attended a meeting in Mexico and the issue arose of SEDAR participation by Mexican scientists. Such participation would likely be as observers and intended to provide data as well as an exchange of methods and technology.

**ACTION:** Approve or reject participation by Mexican scientists, provide guidance on level of participation (i.e., observers or panelists).

## **XI. Other Business**

## **XIII. Next Meeting**

## **XIV. Adjourn**