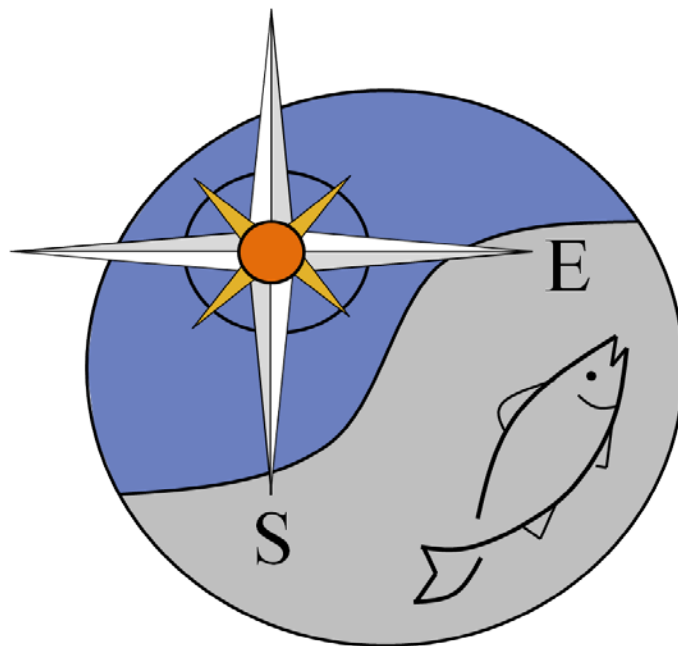


SEDAR



**SEDAR Steering Committee
Meeting Brief
September 20-21, 2016**

Charleston, SC

Version: Briefing Book

9/6/2016

CONTENTS

Introduction.....	1
1. Assessment Project Status Reports	1
2. Research Track Process	1
3. State-Sponsored Assessment Process: Goliath Benchmark Case Study.....	2
4. Assessment Schedule	4
5. Data Best Practices Update	7
6. Stock ID and Meristics Progress Report.....	8
7. NOAA Fisheries Stock Assessment Prioritization Update	11
Other Business	11
Task Review and Next Meeting.....	11
Adjourn	11

Documents

Attachment 1. May 2016 Meeting Summary
Attachment 2. Projects Report September 2016
Attachment 3. 2016 & 2017 Project Schedules
Attachment 4. Research Track Process Proposal
Attachment 5. Research Track Summary Presentation
Attachment 6. SEDAR 47 Goliath Grouper Assessment Report
Attachment 7. SEDAR Project List
Attachment 8. GMFMC Requests
Attachment 9. SAFMC Requests
Attachment 10. ABTA request
Attachment 11. Data Best Practices Panel TORs and Approach
Attachment 12. Stock ID & Meristics Workshop Overview
Attachment 13. NMFS Stock Assessment Prioritization
Attachment 14A. SAFMC Example Prioritization Scoring
Attachment 14B. SAFMC Prioritization Details Spreadsheet

WEBINAR ACCESS

September 20 Webinar Link: <https://attendee.gotowebinar.com/register/422295304470566146>

September 21 Webinar Link: <https://attendee.gotowebinar.com/register/1021300443189967362>

Introduction

1.1. Documents

Agenda

Attachment 1. May 2016 Meeting Summary

1.2. Action

Introductions

Review and Approve Agenda

Approve May 2016 Meeting Summary

1. Assessment Project Status Reports

1.1. Documents

Attachment 2. Projects Report September 2016

Attachment 3. 2016 & 2017 Project Schedules

1.2. Summary

The Projects Report (Attachment 2) provides a narrative of SEDAR activities that are underway. Included is a memo from Luiz Barbieri, FL FWCC, addressing timing of the black grouper assessment. Details of scheduled activities and key deadlines are contained in the 2016 and 2017 project schedule overviews (Attachment 3).

1.3. ACTION

- Approve FL FWCC request to reschedule the black grouper benchmark for completion in December 2017

2. Research Track Process

2.1. Documents

Attachment 4. Research Track Process Proposal

Attachment 5. Research Track Summary Presentation

2.2. Overview

SEFSC staff have presented and discussed the proposed SEDAR Research Track benchmark approach with the Gulf and South Atlantic Councils and SSCs. The proposal document provides details on the process and the presentation provides an overview. The first pilot application of the research track approach is planned for the Gulf of Mexico-South Atlantic scamp assessment beginning in 2018.

At this meeting, the Gulf and South Atlantic Councils are asked to brief the Steering Committee on their Council's reviews and comments, and the Steering Committee is asked to provide guidance on how the process will be applied to the scamp assessment.

2.1. Action

- Provide guidance on the research track approach for the 2018 scamp assessment.

3. State-Sponsored Assessment Process: Goliath Benchmark Case Study

3.1. Documents

Attachment 6. SEDAR 47 Goliath Grouper Assessment Report

3.2. Summary

While the majority of SEDAR projects are devoted to assessments conducted by the SEFSC, assessments prepared through other entities, such as the Gulf and Atlantic States Commissions as well as the FL FWCC, have also been included since the beginning. The level of SEDAR staff involvement in these projects, and overall adherence to SEDAR practices for assessment development, has varied over time. Early projects such as SEDAR 3, yellowtail snapper, were organized by SEDAR staff and closely tracked the SEDAR process. More recently, the role of SEDAR staff has decreased, with assessments prepared according to the practices and policies of the lead analytical group and SEDAR becoming involved primarily as a provider of a peer review. This approach improves productivity and provides maximum flexibility to those preparing assessments. However, as SEDAR staff becomes less involved, and SEDAR practices related to the data and assessment processes become less a factor, concerns may arise with the adequacy of the information provided for peer review. In particular, reviewers and end users may come to associate a certain level of transparency and rigor in the development efforts for assessments offered for SEDAR review. Diminishment of those standards could reflect poorly on the process as a whole.

A benchmark assessment of Goliath Grouper was recently completed as SEDAR 47. Key events are summarized in the table below. The assessment was developed by the FL FWCC and provided for SEDAR to review, with the review panel ultimately finding the assessment inadequate for supporting status inferences. While data limitations were the primary justification of this finding, the reviewers noted a lack of detail in the assessment report and raised procedural concerns with the data and assessment stages that warrant consideration by the Steering Committee. For example, regarding the adequacy of the assessment data, the review panel commented "There was no data workshop so this was difficult to evaluate; the analysts provided some detail, but the RP concluded that there are numerous issues with the data and its treatments, which are outlined below. The RP felt that this assessment could have benefitted from a data workshop (or webinars) to discuss important issues related to the data." This was echoed in one of the individual

reviewer reports, stated as “The assessment process may benefit from wider discussion with other experts as the data and assessments are being undertaken to get a broader perspective from a range of expertise that may enhance modelling choices and the use of data.” These comments suggest that future assessment projects may benefit from a more robust and inclusive approach at the data and assessment stages. Benchmark projects in particular convey expectations regarding assessment development that should be upheld to the extent possible.

SEDAR 47 Southeastern U.S. Goliath Grouper Timeline

Date	Event
October 2014	Goliath Grouper added to the schedule at the SEDAR Steering Committee
July 2015	SEDAR 47 Review Workshop Schedule approved by Cooperators
September 11, 2015	Data Deadline
October 2015	SEDAR 47 Review Workshop Terms of Reference approved by Cooperators
February 19, 2016	SEDAR informed of a FWC “Data/Assessment Workshop” to be conducted
March 14-16, 2016	FWC ran a non-SEDAR Data/Assessment Workshop
April 29, 2016	Assessment Report delivered to the Review Panel
May 17-19, 2016	Review Workshop
May 17, 2016	Only one working paper was provided for this project. No reference documents were received for this process.

After reviewing the reviewer recommendations from SEDAR 47 and considering past assessment experiences, SEDAR staff suggests that a proposal be provided for future state-sponsored assessments that documents the approach to be used in developing the assessment for peer review and the role of Cooperators and SEDAR staff in the process. The proposal should be reviewed by the Steering Committee prior to the project being approved for the SEDAR schedule, and, if desired, could also be reviewed by the Cooperators who will bear ultimate responsibility for developing fishing level recommendations and management actions based on the outcome. General topics to be addressed in the proposal are listed below. The Steering Committee is asked to consider if additional information is desired or if specific process requirements should be imposed.

Topics to consider for the assessment proposals:

1) Analytical agency and Personnel

Agency that will conduct the assessment

Project Coordinator and administrative contact

Lead analyst or team members

- TOR and schedule approval
- 2) Data review and evaluation
 - Review approach
 - Desired SEDAR, NMFS, and Cooperator support
- 3) Assessment development
 - Assessment process
 - Desired SEDAR, NMFS, and Cooperator support
- 4) Peer Review
 - Type of Review
 - Desired SEDAR, NMFS, and Cooperator support
- 5) Distribution and Presentation to Cooperators

3.3. **Action**

- Provide guidance on the process used to develop state-sponsored assessments and the role of SEDAR and Cooperators in such assessments in the future.

4. Assessment Schedule

4.1. **Documents**

- Attachment 7. SEDAR Project List
- Attachment 8. GMFMC Requests
- Attachment 9. SAFMC Requests
- Attachment 10. ABTA request

4.2. **Summary**

The Committee is asked to finalize assessment projects for 2018 and identify priorities for 2019 to 2022. Identifying long term priorities is necessary for coordinating SEDAR research needs with grant programs such as CRP and MARFIN. With competitive grant programs such as these, it may take as much as 5 years between a research need being included in an RFP and a complete project being available for consideration in a SEDAR workshop.

Past SEDAR assessment projects are provided in Attachment 7. Individual Cooperator priorities and requests are provided in Attachment 8 for the GMFMC and Attachment 9 for the SAFMC. SEDAR received a letter from the Atlantic Bluefin Tuna Association regarding consideration of a Dolphin assessment, provided as Attachment 10.

The quarterly planning worksheet is included as Appendix 1.

Schedule Topic Highlights

- 1. GMFMC Requests – Attachment 8
 - 1.1 Gray Triggerfish rather than Gray Snapper in 2017

- 1.2 2018-2021 priorities
- 1.3 Updated King Mackerel projections
2. SAFMC Requests – Attachment 9
 - 2.1 SAFMC priorities 2018-2020
 - 2.2 Black Sea Bass Standard, 2017
 - 2.3 Blueline Tilefish revised timing
3. FL FWC Requests
 - 3.1 Black Grouper benchmark to begin in 2017
4. Other Cooperator Requests
5. Additional Requests
 - 5.1 American Bluefin Tuna Association letter: Dolphin

Future Procedural Workshops

The Steering Committee asked for feedback from the SEDAR Data Best Practice Standing Panel on the next Procedural Workshop topic. Addressing reproductive inputs and their role in reference points was suggested by the Steering Committee at the prior meeting. The Panel recommended holding a workshop on reference points which would include the topic of reproductive inputs, and noted other efforts to discuss reproductive measures and inputs nationally, including meetings planned for later in 2016 and 2017. In addition, some of the SSC's have recently discussed reference point selection. The proposed workshop could build on these efforts. The Standing Panel also identified natural mortality as a potential Procedural Workshop topic due in part to the new Then et al. 2014 estimation methods. The Panel noted the natural mortality issue was time sensitive since natural mortality estimation methods could potentially affect all assessments, but noted this topic could potentially be addressed outside of SEDAR, perhaps through joint SSC discussions. Other potential Procedural Workshop topics that have been discussed include: Assessment Best Practices, Discard Mortality, and a second Stock ID & Meristics workshop focusing on shark species in 2018. Given the wide range of topics considered, and the overlap of this topic with the stock ID and the best practices groups, staff developed summary recommendations for Committee consideration .

Staff Recommendations

- 2018: Shark Stock ID
- 2019: Reference Points – estimation and influences
- 2020: Stock ID & Meristics II (2017 workshop addresses stocks scheduled through 2020)
- 2021: Assessment Best Practices (should follow the research track pilot)
- Other Topics: Discard mortality, Natural Mortality

4.3. **Action**

- Finalize the 2018 assessment schedule

- Address Cooperator requests
- Provide guidance on future procedural workshops

Table 1. Assessment Project Schedule and Details Overview.

Start Year	SEDAR #	SPECIES & JURISDICTION	Assessment Track	Terminal Year of Data	Available to Cooperator
2016	49	GMFMC Data-limited species	Benchmark	2014	December 2016
	50	SAFMC / MAFMC/GMFMC blueline tilefish	Benchmark	TBD	TBD
	U	SAFMC tilefish	Update	2014	April 2016
	U	HMS dusky shark	Update	2015	July 2016
	U	GMFMC gag grouper	Update	2015	January 2017
	53	SAFMC red grouper	Standard	2015	February 2017
	U	GMFMC greater amberjack	Update	2015	February 2017
2017	51	GMFMC gray snapper	Benchmark	2015	April 2018
	48	FL FWC black grouper	Benchmark	2015	April 2017
	52	GMFMC red snapper	Standard	2016	March 2018
	U	SAFMC vermilion snapper	Update	2016	April 2018
	U	HMS Gulf of Mexico blacktip shark	Update	2016	April 2018
	R	SAFMC MRIP Catch Revisions		2016	TBD
	R	GMFMC MRIP Catch Revisions		2016	TBD
	54	HMS sandbar shark	Standard	2015	January 2018
Future Priorities (tentative)					
2018		HMS Atlantic blacktip shark	Benchmark		
		SAFMC / GMFMC scamp	Benchmark		
		FL FWC yellowtail snapper	Benchmark		

SEDAR Methods and Procedures Workshops

Number	Year	Topic
1	2008	Indices Development and Evaluation
2	2008	Evaluating and Modeling Catchability
3	2009	Caribbean Data Review
4	2010	Evaluating Assessment Uncertainty
5	2012	GOM Episodic Events Workshop
6	2014	South Atlantic Shrimp Data Evaluation
7	2015	Best Practices, Data
8	2017	Stock ID and Meristics Workshop

5. Data Best Practices Update

5.1. Documents

Attachment 11. Data Best Practices Panel TORs and Approach

5.2. Summary

The SEDAR Data Best Practices workshop was held June 22-26, 2015 in Atlanta, GA. Participants developed and documented many Best Practices that are being applied in current assessment projects.

The SEDAR Data Best Practice Panel met via webinar in June, July, and September 2016. The Panel continued work on their Terms of Reference and Approach document, incorporating the feedback received from the Steering Committee. The Panel's finalized ToR and Approach document is offered for review and consideration by the Steering Committee.

The Panel has also been working to develop a Data Best Practice Living Document which will house all of the Data Best Practices recommendations and will be updated, as necessary, into the future. The original Procedural Workshop 7: Data Best Practices report contained some information specific to the workshop itself. The Living Document will contain all of the recommendations from the original report with a brief introduction highlighting the role of the Standing Panel and the process for modifying existing or creating new Best Practice recommendations. The original report will remain available on the SEDAR Procedural Workshop 7 web page.

The Panel has also been working to develop a Data Issue Inventory that will be a running list of the identified SEDAR data issues. The current draft Data Issue Inventory contains issues identified during the SEDAR Procedural Workshop 7 workshop process. The Inventory will be updated in the future as new issues are identified.

Additionally, a new SEDAR Data Best Practices webpage has been added to the SEDAR website (<http://sedarweb.org/sedar-data-best-practices>). Meeting summaries from the Standing Panel are currently available on the website and the Data Best Practices Living Document and Data Issue Inventory will be posted to the webpage once complete. SEDAR staff will continue to build out the webpage this fall as these additional documents are finalized.

5.3. **Action**

- Review and provide feedback on the Data Best Practice ToR & Approach document.

6. Stock ID and Meristics Progress Report

6.1. **Documents**

Attachment 12. Stock ID & Meristics Workshop Overview

6.2. **Summary**

Planning is underway for the Stock ID & Meristics Procedural Workshop. The primary goal of the workshop is to develop biological stock structure recommendations and meristic conversion equations for species that have been or will be assessed through the SEDAR process to help streamline such decisions for future assessments. The Organizing Committee

(OC) met via webinar in July and August 2016 to begin developing Terms of Reference, identifying species to include in the workshop, and to discuss workshop location and timing.

The OC recommends the workshop be held in Atlanta, GA in late 2017 (exact dates TBD). Terms of Reference are offered for the Steering Committee's consideration in Attachment 12. The OC recommends the following species be included in the 2017 Stock ID & Meristics workshop: **cobia, scamp, gag, white grunt, yellowmouth grouper, and gray triggerfish**. Criteria used to prioritize species included: schedule/timing of next assessment – with benchmark assessments receiving highest priority; recommendations/findings on Stock ID from previous SEDAR SAR's (e.g. were there studies with conflicting results, did the stock ID issues appear to be settled with data available, etc.); and workload (e.g. how many species could realistically be handled at a workshop). See Table 2 below and Attachment 12 for additional details. The OC thought it may be possible to handle one additional species during the workshop and would like to get feedback from the Steering Committee on their next priority species based on their future assessment priorities.

In addition to providing feedback on the Terms of Reference and species selection recommendations, the OC is interested in getting guidance from the Steering Committee on the following topics:

- **How to handle when biological and/or assessment unit stock recommendations do not match existing management units:** The OC included a ToR (#1d) to identify and discuss when recommendations on biological stock structure, assessment stock unit, and the existing management unit do not align. When mismatches are identified, it is currently unclear who makes the final decision on how this should be handled for the assessment and for management actions which may follow.
- **Stock ID workshop recommendations and their potential impact on SEDAR assessment planning:** How will the recommendations from Stock ID & Meristics workshops affect future SEDAR scheduling? For example, if a species is scheduled for an update or standard assessment and Stock ID workshop findings recommend a change in stock structure, does that automatically trigger the next assessment for that species to be a benchmark, or can such changes be handled through the standard process in some cases? Stock ID recommendations can also potentially affect workload. For example, if Stock ID findings recommend a multi-region assessment (e.g. South Atlantic and Gulf of Mexico combined) that could potentially impact the workload of data and assessment personnel in both regions which could impact schedule planning.

Table 2. SEDAR Stock ID & Meristic Workshop Organizing Committee's recommendations for species to include in the 2017 workshop.

Species	Justification
Cobia	SEDAR Steering Committee priority; South Atlantic benchmark on schedule for 2018; potentially complex Stock ID issues (includes inshore/offshore component), new studies since last assessment
Scamp	SEDAR Steering Committee priority; South Atlantic & Gulf of Mexico benchmark on schedule for 2018; first time assessment
Yellowmouth Grouper	SEDAR 49 (GoM Data Limited) yellowmouth grouper assessment halted due to species ID issues between yellowmouth grouper and scamp, recommend assessing scamp and yellowmouth grouper at same time to further discuss species ID issues; South Atlantic & Gulf of Mexico scamp benchmark on schedule for 2018
White Grunt	SAFMC requested white grunt benchmark assessment in 2020; first time assessment; may be complex stock structure - genetics and growth differences seen between Carolinas and South Florida
Gag	In past assessments, previous guidance from Councils to use mgmt. boundaries; documentation from past assessments note conflicting data in regards to Stock ID
Gray Triggerfish	GMFMC request benchmark in 2018; SAFMC request benchmark in 2020; little documentation on stock ID in some past SAR's; some documentation suggests biological stock may not match existing mgmt. or assessment unit stocks

6.3. **Action**

- Review and provide feedback on Terms of Reference, species recommendations, and workshop timing for the Stock ID & Meristics workshop.
- Provide guidance on how to address situations where biological stock structure and/or assessment unit recommendations do not align with existing management units.
- Provide guidance on Stock ID recommendations impact on SEDAR assessment planning.

7. NOAA Fisheries Stock Assessment Prioritization Update

7.1. Documents

Attachment 13. NMFS Stock Assessment Prioritization

Attachment 14A. SAFMC Example Prioritization Scoring

Attachment 15B. SAFMC Prioritization Details Spreadsheet

7.2. Summary

NOAA Fisheries developed a tool to help Councils and the agency prioritize assessments. It was presented to the SSCs and Councils during Fall and Winter 2015. The tool is designed to be applied at the Council level, with Council's around the country at various stages of development. The SAFMC SSC considered example scoring of prioritization criteria, and intends to consider those criteria requiring expert judgement in detail, working cooperatively with AP representatives, at its next meeting in October 2016. The current scoring approach is provided as an example. Attachment 14A is the summary table showing the scoring for each species, and attachment 14B is the spreadsheet providing details on how the values were derived.

Each Council is asked to report to the Steering Committee on its progress in reviewing and applying the prioritization tool. The Committee is asked to consider how the prioritization process can be used in SEDAR project planning.

7.3. Action

- Provide guidance on how the prioritization process can be used in SEDAR project planning.

Other Business

Task Review and Next Meeting

Based on past practices, the next meeting will be held via webinar in May 2017.

Adjourn

Appendix 1. Workload Planning Worksheet, 2016-2019.

YEAR	Quarter	South Atlantic Team				Gulf/Caribbean					HMS		FL FWCC	Extra	SEDAR
		1	2	3	4	1	2	3	4	5	1	2	1		WS
2016	1	RS/GT	RS/GT			GDL	GDL			CDL			GG	SA gT	
	2	RS/GT	RS/GT			GDL	GDL			CDL	DS		GG	SA gT	
	3	BL	BL		<i>RG</i>	GDL	GDL				DS				
	4	BL	BL		<i>RG</i>	GDL	GDL	GAJ	GAG						
2017	1	BL	BL		<i>RG</i>	GDL	GDL	GS					BLG		
	2	BL	BL					GS				<i>SBS</i>	BLG		SID
	3	BL	BL	MRIP				GS	MRIP			<i>SBS</i>	BLG		SID
	4			MRIP	VS		<i>RS</i>	GS	MRIP	<i>RS</i>	GBt	<i>SBS</i>	BLG		
2018	1	S/RT		MRIP	VS	S/RT	<i>RS</i>	GS	MRIP	<i>RS</i>	GBt		YTS		
	2	S/RT		MRIP		S/RT			MRIP				YTS		
	3	S/RT				S/RT							YTS		
	4	S/RT				S/RT					ABt		YTS		
2019	1	S/RT				S/RT					ABt				
	2	S/RT				S/RT					ABt				
	3														
	4														

BENCHMARK

Benchmarks are in Bold. Project number listed where know, otherwise species listed. These require 5 quarters, 4 for the SEDAR process and 1 for SSC reporting and projections

Standard

Standard Projects in Italics. These require 2 quarters.

Update

Update Projects in plain font. These require 1 quarter.

Codes

gT	golden Tilefish	BL	Blueline Tilefish	RS	Red Snapper
S/RT	Scamp, Research Track Pilot	RG	Red Grouper	GAG	Gag Grouper
DS	HMS Dusky Shark	VS	Vermilion Snapper	SBS	Sandbar shark
GBt	Gulf Blacktip Shark	GAJ	Greater Amberjack	YTS	Yellowtail Snapper
RSGT	Red Snapper, Gray Triggerfish	ABt	Atlantic Blacktip Shark	GDL	Gulf Data Limited
BLG	Black Grouper (review only)	ABP	Best Practices, Assessments	GS	Gray Snapper, start time TBD
MRIP	Revision Updates for MRIP Data	GG	Goliath Grouper (review only)	SID	Stock ID and Meristics
CDL	Caribbean Data Limited				