

SEDAR PROGRAM DEVELOPMENT & TIMELINE

1) Beginnings: 2002-2003

a) Why?

SAFMC raised data concerns about an assessment of Red Porgy, published in Fish Bull. This led SEFSC + SAFMC to brainstorm a new assessment approach to address data challenges, independent peer review, and greater participation by data providers and the SSC.

b) First Stocks

i) SEDAR 1 Red Porgy in 2002

Set up the Data-Assessment-Review Framework

Established initial rules of consensus, just science, cooperative efforts, suggesting solutions

ii) SEDAR 2 Black Sea Bass in 2003

iii) SEDAR 3 Yellowtail Snapper and ASMFC Menhaden Review

Initiated the cooperation with other assessment agencies (FWCC) and working with interstate commissions (ASMFC)

c) Regional Expansion

SEDAR Steering Committee forms, meets: August 2003

STC formed with 3 Councils, 2 Commissions, SERO, SEFSC.

FACA and AP underpinnings established

i) Assessment schedule developed through 2005 (extremely optimistic)

Intended SEDAR to address significant, challenging assessment issues

2) 2004

a) Extend assessment planning horizon to 3 yrs, priorities to 5 for research

b) Began to develop more robust guidelines

c) Prohibited Council and SEDAR staff serving as reviewers

3) 2005

a) Experiment with including management coordination at the Steering Committee (similar to the NRCC). *This never really took hold, and was dropped altogether in a few years.*

b) Stated that the SEDAR priority is Benchmarks, and reiterated that SEDAR is not the sole assessment source

c) Went to an all CIE review panel to increase independence and rigor

d) Continue to refine process of workshops, appointments, standardizing reports

- e) Request that SEDAR data needs be reflected in regional RFPs (CRP, MARFIN)
 - f) Update process defined, SSC role clarified
- 4) 2006
- a) Gave update responsibility to the Council and SSCs.
 - b) Concerns raised with workload, particularly on SEFSC staff
 - c) Beginning to note assessments are taking longer, concerns raised with delays in SEDAR 7, 8 and 9. Participants were requesting schedule extensions, but STC was concerned that would reduce productivity. (At this time benchmarks were allotted 6 months)
 - d) Debate whether ABC should remain a SEDAR product. *(Ultimately agreed that assessments should provide the information and values for benchmarks for use and consideration by the SSC, but it was the responsibility of the SSC to actually specify the values)*
 - e) Recommended that SSCs should present assessment findings to the Council
 - f) Increasing travel costs noted
 - g) Discussed importance of SAFE reports
- 5) 2007
- a) Added a Council appointee to the Review panel, and made this appointee responsible for presenting the assessment to the Council.
 - b) Increased time allotted to benchmarks to 9 months
 - c) Stressed SSC representation at all workshops, for increased consistency. Assigned an SSC member to serve as “lead editor” of the assessment report, with responsibility to serve as the AW spokesperson at the RW.
 - d) Initiated the assessment data input datasheet to reduce errors *(Only continued by Beaufort Team. The information was not widely used by Councils and SERO for FMP analyses as initially intended.)*
 - e) Initiated “Procedures Workshops”
 - f) Continued to debate the “double assessment workshop” concept initially raised in 2004, but unable to implement due to financial and time resource realities. Suggested adding milestones between workshops and more use of conference calls.
 - g) Analytical teams empowered to communicate with the assessment panel via email or conference call as needed to develop an initial, operational assessment model prior to the start of the AW.
- 6) 2008
- a) Shark assessments fully incorporated into SEDAR, and HMS joined.
 - b) Workload concerns from MSA reauthorization and OFL/ACL requirements.

- c) Extensive productivity discussion, noted that needs are not being met.
- d) Agreed to rely more upon updates, and noted that up to 10 updates a year may be required to meet assessment needs.
 - i) Only possible with strict adherence to limited TORs
 - ii) Cannot address all issues with each update
 - iii) Assessments cannot become research projects and still be timely
- e) AW squeeze: More concern with delays in completing projects. Noted that late data delivery hindered the AW, which then struggled to meet RW deadlines.

7) 2009

- a) Extensive Process changes considered this year.
 - i) Considered, but not retained (*Overall, because productivity gains seemed unlikely from these changes*)
 - (1) Single annual data workshop – one workshop to compile and evaluate data for all benchmark assessments in the year. The report will focus on data issues and treatments, rather than the final and complete input dataset. An assessment workgroup will be added to the DW, to consider model issues. (*Too challenging for participants – too many stocks and too much work*)
 - (2) Pre-Review comment period – an open public comment period added after an extended AW. Noticed in the FRN. (*added too much time, no clear value*)
 - (3) Two step AW process: develop the model in AW I, refine in AW II after pre-review. Both are extended processes relying heavily on webinar. (*attempted; added too much time*)
 - (4) Peer review held as part of an SSC meeting. (*Too difficult to schedule, SSC meetings already busy*)
 - (5) Regular scheduling of the steps: DW in March, Aw June-July, pre-Review August, AW II in September-December, RW in January. (*too prescriptive*)
 - (6) Alternating years scheduling – Benchmark years and update years, with Cooperators offset. Thus, SAFMC in a benchmark and GMFMC in an update in a year, vice-versa the following year. (*Attempted briefly. Inadequate flexibility to address management needs – particularly in light of growing OFL/ACL demands at this time that increased schedule challenges*)
 - ii) Retained
 - (1) Extended AW process with meetings largely via webinar.
 - (2) Every stock will go through a benchmark first, then rely on updates thereafter until a change is justified.
 - (3) SSC members serve as RW chair.

- b) SEDAR meetings are not webcast, but individuals from the public desiring to do so on their own will not be stopped. Nor will they be supported or given any access to SEDAR equipment.

8) 2010

- a) Continued productivity concerns, as project schedules expand in response to participants demands for more time to complete activities.
- b) Recognized that the Councils needed to better define their needs, and SEFSC to better define capabilities.
- c) Convened a “task force” to evaluate the process and proposed changes. Recognized that the major changes proposed in 2009 were not feasible, and quickly returned to the status quo.
- d) Suggested standing committees (similar to prior assessment panels) to increase consistency.
- e) Discussion on the meaning of transparency and the role of public comment.

9) 2011

- a) Revised process guidance adopted
 - i) SEFSC prepare first draft of TORs, based on template design by SEFSC.
 - ii) Improve consistency and documentation
 - iii) Develop a checklist of common assessment issues
 - iv) Use workshops (*“intercessional”, more commonly called “procedural”*) to address inter-assessment issues (best practices)
 - v) Assessments do not ‘expire’.
 - vi) SSCs should be included in each Council’s assessment planning
 - vii) Established 3 assessment categories: Benchmark, Standard, Update. SEDAR involvement with the update process limited to ToR approvals and data deadline scheduling.
 - viii) SEDAR no longer provides travel support for Council members
 - ix) 2 SSC appointees added to the RW
 - x) Created a SEDAR technical committee for more direct SSC feedback (*essentially faded out due to lack of regular activity*)

10) 2012

- a) Reiterated Updates as the default follow-up assessment
- b) Stressed the need for strict TORs for SEDAR assessment projects to control project creep, with SEFSC taking lead on drafting specific TORs for each assessment from the default TORs approved by the Steering Committee.

- c) Considered dropping the AW, altogether or holding via webinars to save time and money.
- d) Agreed that webinar participation is not practical for DWs

11) 2013

- a) Concerns that future budget reductions will reduce productivity.
- b) Extensive process and productivity discussion
- c) Noted again that project delays are largely due to missed data deadlines. Agreed to a data methods workshop (*became Data Best Practices*) to help this problem
- d) Added an "IPT" approach provision to allow and encourage communication between the analytical team and the appointed panelists. (*note a similar concept was supported in 2007*). Public comment and transparency would be retained by scheduling webinars based around model development milestones. (*This approach has never really taken hold with analysts. There seems a hesitancy to act on decisions that are not made through the AW webinars at the milestones*)
- e) Modified AW and RW guidelines and TORs to address provisions of NS2 guidelines.
- f) Clarified the difference in the 3 assessment types, and clarified what is allowed to change in a standard. (*In current practice, the SSC and Cooperator largely determine whether changes to be considered justify a benchmark rather than standard, or standard whether than update. Because the SSC must peer review standards and updates, and act on the results of all assessment types, they are critical to determining the acceptable type*)
- g) Agreed that schedule changes only involving the SEFSC and a single cooperator can be resolved by the Cooperator and SEFSC without SEDAR Steering Committee participation. The Cooperator will inform SEDAR of the changes.

12) 2014

- a) Changes in the assessment summary document: Coordinators will develop an executive summary that serves as a guide to navigating the document. Cooperators should develop technical summaries to meet their needs.
- b) Approved SOPPs changes updating the AW process, relying upon milestones and the IPT approach.
- c) Coordinators instructed to report product delivery delays to the Cooperator Liaison and Steering Committee Chair / SEFSC Director.

13) 2015

- a) Data Best Practices guidelines are available. Major re-working of data delivery and deadlines, based in the needs of the data providers. Translated into even more protracted assessment schedules.

- b) Stock ID concerns raised; determined that stock ID should be decided prior to the DW.
- c) Starting to hear about the NMFS prioritization plan
- d) First mention of the “Research Cycle”
- e) Requested information on the assessment resources has available for each Cooperator.

14) 2016

- a) More on the research track & MRIP revisions.
- b) Agreed to provide full SEDAR support for FWCC assessments.
- c) Requested that state or non-SEFSC assessment providers, who desire a SEDAR peer review, provide a detailed proposal on the assessment and how it will be developed.

15) 2017

- a) Continued research track deliberations