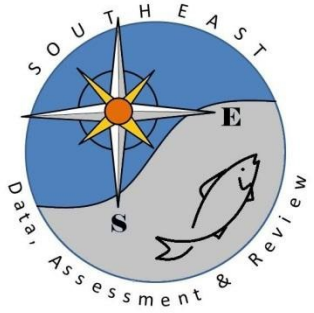
Standard Operating Policies and Procedures



SouthEast Data, Assessment, and Review

Cooperative Stock Assessment Development and Review Program of:

NOAA Fisheries Southeast Fisheries Science Center

NOAA Fisheries Southeast Regional Office

South Atlantic Fishery Management Council

Gulf Fishery Management Council

Caribbean Fishery Management Council

Atlantic States Marine Fisheries Commission

Gulf States Marine Fisheries Commission

Florida Fish and Wildlife Conservation Commission

NOAA Fisheries Highly Migratory Species Management Division

SEDAR

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INTRODUCTION

SouthEast Data, Assessment, and Review (SEDAR) is a cooperative Regional Fishery Management Council process initiated to improve the quality and reliability of assessments of fishery resources in the southeastern United States, including the South Atlantic, Gulf, and US Caribbean. SEDAR is managed by the three Regional Fishery Management Councils in the Southeast in coordination with NOAA Fisheries, the Interstate Marine Fisheries Commissions (Atlantic States MFC and Gulf States MFC), and the Florida Fish and Wildlife Conservation Commission (FL FWC). SEDAR seeks to improve the quality and reliability of stock assessments, improve the quantitative basis of fishery management actions, and increase the relevance of research and monitoring programs in the Southeast Region.

The SEDAR process is a rigorous process that prioritizes thoroughness and transparency and can take significant time to complete. Given the number of species for which management advance is needed, it should not be considered the sole source of assessment information available to the Councils and other Cooperators.

This document describes SEDAR operating policies and procedures as determined by the SEDAR Steering Committee. Nothing in this document should be considered to supersede the SOPPs of any program Cooperators.

Definitions

Advisory Panel (AP)	Designated advisors within the Federal fishery management system as specified in the Magnuson-Stevens Act.
Analytical Team	Scientists appointed by the lead assessment agency who are charged with preparing technical analysis required for an assessment.
Appointed Observer	Any individual appointed by a Cooperator to observe SEDAR assessment project meetings.
AR	Administrative Record, cumulative official proceedings and administrative documentation
ASMFC	Atlantic States Marine Fisheries Commission
Assessment	A quantitative evaluation of a population parameters for a fish stock
Assessment Project	The overall process of preparing an assessment through SEDAR. An assessment project may include multiple individual stock assessments.
Assessment Stage	Stage of the process where population modeling is conducted.
Attendees	Individuals who attend SEDAR meetings but are not appointed by any Cooperators to a specific role.
CFMC	Caribbean Fishery Management Council
CIE	Center for Independent Experts. An entity established by NOAA Fisheries in 1998 to provide external, independent expert reviews of science used for policy decisions.
Confidential Data	Data which are protected by the confidentiality rules of the collecting or compiling organization. Typically applies to commercial fishery information related to a business.
Consensus	A decision-making process characterized by discussion of multiple viewpoints rather than voting, and generally described as reaching a position which all participants can "live with", even if it is not their preferred position. Within SEDAR, reaching consensus can include recommending alternatives or multiple values for an assessment parameter as opposed to a single position.
Cooperator	Agencies and organizations that participate in and provide oversight of SEDAR
CTB	Cooperator Technical Body, such as an SSC of a Council or Technical Committee of an Interstate Commission
Data Stage	Stage of the SEDAR process where data sets are reviewed and considered for use in the assessment.
Data Scoping	The initial component for an assessment. Identifies potential data sets available for use in the assessment and respective data providers and provides opportunity for the panel to suggest additional topics or data to be considered for use in the assessment.

Data Webinar	Convened when there is not a data workshop for an assessment. Tasked to review and make recommendations on specific data topics identified in the Terms of Reference.
Desk Review	A type of peer review where reviewers consider material on their own and submit individual written findings.
FL FWC	Florida Fish and Wildlife Conservation Commission
GFMC	Gulf Fishery Management Council
GSMFC	Gulf States Marine Fisheries Commission
HMS	NOAA Fisheries Highly Migratory Species Management Division
Lead Analyst	Scientist, appointed by the lead assessment agency, to lead the analytical team and conduct and oversee technical analyses required for the assessment.
Lead Assessment Agency	The agency which will conduct the primary assessment analyses required to address SEDAR assessment project Terms of Reference. For most assessments this is the SEFSC, but it can also include state marine fisheries agencies such as the Florida Fish and Wildlife Conservation Commission.
MSA	Magnuson-Stevens Act. Federal law governing fisheries management.
NGO	Non-governmental organization.
NMFS	National Marine Fisheries Service, aka NOAA Fisheries
NOAA	National Oceanic and Atmospheric Administration
OMB	Office of Management and Budget
Panel	A group of individuals appointed by a SEDAR Cooperator that is charged with making decisions and recommendations to address assessment project TORs.
Pre-Data Workshop Webinar	Convened prior to a data workshop to discuss data received, potential data issues, and critical preliminary analyses.
Post-Data Workshop Webinar	Convened after a data workshop to finalize data recommendations from the data workshop.
Project Schedule	Detailed list of the steps and timing for an assessment project.
Reference Documents	Published documents such as journal items or agency reports.
Review Panel	Group of individuals who review the products from data and assessment stages are scientifically sound.
SAFMC	South Atlantic Fishery Management Council
SAR	Stock Assessment Report
SEDAR	Southeast Data, Assessment, and Review
SEDAR Coordinator	SEDAR Staff who provide project management
SEFSC	NOAA Fisheries Southeast Fisheries Science Center
SERO	NOAA Fisheries Southeast Regional Office
SOPPs	Standard Operating Procedures and Policies
SSC	Scientific and Statistical Committee. Each Council is required by the MSA to have an SSC.

Stakeholders	Everyone interested in the assessment for a specific species.
Steering Committee	Administrative oversight body for the program
Terms of Reference (TORs)	Terms of Reference, specifying the tasks and objectives for an assessment project
Topical Working Group (TWG)	Small working groups assembled to discuss specific topics identified in the Terms of Reference for a given SEDAR Assessment. They are comprised of members of the analytical team, SSC, stakeholders, and other technical experts and provide feedback and recommendations to the analytical team conducting the assessment.
TWG Scoping Webinar	The initial SEDAR component for a topical working group. Defines the data or assessment topic and why it is being considered. The panel requests analyses needed to address the topic. Lead assessment agency conducts an additional data scoping prior to this scoping webinar for topics not covered by the SEDAR TWG.
TWG Recommendations Webinar	Following the TWG Scoping webinar, the analytical team presents the requested analyses. The panel discusses whether the analyses meet their scoping request then provide final recommendations to the analytical team.
Webinar	A method of meeting which connects participants via the internet. Webinars allow all participants to hear each other as well as to see the same information on their computer screens.
Working Paper	Informal written documentation of data sets or analyses submitted during a SEDAR project to provide background or specific details.

The following sections and bullets within the sections are not in any order of priority.

1. Program Goals

The program goals should serve as guiding objectives for the SEDAR program.

- Provide robust and transparent assessments
- Provide stakeholder involvement in the assessment process
- Provide reliable and scientifically rigorous assessments
- Provide independent peer review of assessment products
- Provide timely assessment products
- Provide thorough documentation of methods, data, and review outcomes
- Provide repository for all assessment materials

2. Administration and Oversight

This section outlines the administrative structure and governing oversight of the SEDAR program.

2.1 SEDAR Cooperators

A SEDAR Cooperator is defined as an agency or organization that provides oversight to the SEDAR program.

- NOAA Fisheries Southeast Fisheries Science Center (SEFSC)
- NOAA Fisheries Southeast Regional Office (SERO)
- South Atlantic Fishery Management Council (SAFMC)
- Gulf Fishery Management Council (GFMC)
- Caribbean Fishery Management Council (CFMC)
- NOAA Fisheries Highly Migratory Species Management Division (HMS)
- Atlantic States Marine Fisheries Commission (ASMFC)
- Gulf States Marine Fisheries Commission (GSMFC)
- Florida Fish and Wildlife Conservation Commission (FL FWC)

2.2 Program Oversight

Oversight of the SEDAR process and operations schedule is provided by the SEDAR Steering Committee.

- The SEDAR Steering Committee shall be included as an official Council Advisory Panel (AP) in each Council's Standard Operating Policies and Procedures (SOPPs).
- The SEDAR Steering Committee shall meet at least once annually to review policies and establish the work plan.
- The Steering Committee is composed of representatives of SEDAR Cooperators, including:

- SEFSC Director
- SERO Regional Administrator
- Executive Directors of the SAFMC, GFMC and CFMC
- Chairs of the SAFMC, GFMC and CFMC
- HMS Division Chief
- Executive Directors of the FL FWC, ASMFC and GSMFC.

- The SEDAR Steering Committee is supported by SEDAR Staff.
- SEDAR Steering Committee members may designate alternates.
- The SEFSC Director shall chair the Steering Committee.
- The SEDAR Steering Committee shall operate primarily by consensus. This does not preclude the use of motions when there is no clear consensus or for formal actions such as approving the SOPPs.

2.3 Program Administration

SEDAR is primarily administered through the SAFMC with funding provided by NOAA Fisheries, although, as described below, other cooperators also provide various administration functions.

2.3.1 General

- The SAFMC Executive Director, Administrative Officer, and SEDAR Program Manager shall develop an annual (calendar year) SEDAR activities schedule and budget.
- The SEDAR Program Manager will develop an annual (Calendar Year) SEDAR activity schedule based on the Steering Committee's approved project schedule and standard participant allowances. The activity schedule details workshop and travel expenses for each project or event and is used to estimate program costs. The Steering Committee will be asked to modify the number of projects and Coordinators will be asked to consider modifying the number of SEDAR-supported participants for their projects if costs exceed available funding.
- SAFMC provides primary program staffing and support. This includes the SEDAR Program Manager, SEDAR Coordinators as needed based on workload and funding, and general SEDAR administrative support.
- SAFMC maintains the SEDAR Administrative Record (AR).
- GFMC provide administrative support for SEDAR workshops involving GFMC managed species.
- The SEDAR Steering Committee may enter into alternative administrative arrangements, with Cooperators and other organizations, as deemed necessary for the program.
- If a policy or process issue arises that is not addressed by existing SEDAR policies stated in the existing SOPPS, the group where the issue arises may develop an interim consensus solution. In addition, the issue will be reported to the Steering Committee by the SEDAR Program Manager for final resolution and policy development.

2.3.2 Travel

- SAFMC administers travel and meeting arrangements for all Cooperators, except in special circumstances that will be determined by the Cooperators and Steering Committee during project planning.
- SEDAR travel orders and travel reimbursement will be provided for workshop panelists and observers appointed to specific workshops by a Cooperator, and SEDAR staff supporting SEDAR workshops.
    - Should the desired number of participants be greater than what can be supported by SEDAR, the Cooperator may fund additional travel for those individuals to attend the workshop.
- Travel orders will be issued, and reimbursements provided, in accordance with applicable SAFMC policies, rules and regulations.
- SEDAR is prohibited from providing travel support for federal employees.
- For each SEDAR project, the SEDAR coordinator will inform the cooperators of the number of individuals that SEDAR can reimburse for travel expenses. Any additional participants will need to have their expenses covered by the cooperator making the appointment.

2.4 SEDAR Staff Responsibilities

The following is a general description of primary SEDAR staff responsibilities. The Steering Committee may approve other arrangements and assignments of these responsibilities as necessary to meet program objectives and address funding issues. Such arrangements may be described in grant documents, project plans, steering committee meeting summary, or memoranda as appropriate. Some of the listed SEDAR staff responsibilities are further detailed in **Section 5 SEDAR Approach**.

2.4.1 SEDAR Program Manager

- Ensure SEDAR SOPPS and Steering Committee policies are followed during assessment projects.
- Supervise SEDAR Staff.
- Provide staff support to the Steering Committee.
- Represent the SEDAR program at meetings and conferences as necessary.
- Ensure that SEDAR productivity analyses are maintained
- Ensure that Information Quality Act (IQA) is maintained for all assessments
- Provide annual activity schedules for SAFMC budgeting
- The SEDAR Program Manager may also serve as a SEDAR Coordinator for assessment projects.

2.4.2 SEDAR Coordinator

- Serve as liaison between Cooperators, analytical agencies, data providers, and others involved in SEDAR projects to develop project plans and deadlines and manage progress.
- Ensure SEDAR guidelines and Steering Committee policies are followed during assessment projects.

- Represent SEDAR at Cooperator technical body (CTB) or Council Scientific and Statistical Committee (SSC) meetings when assessments are presented and at other times as necessary when SEDAR issues are on the agenda. Attendance at CTB meetings is contingent upon funding, scheduling and availability.
- Ensure technical and administrative documentation for the AR is complete and up to date for each project.
- Chair, as a facilitator, during data and assessment stages.
- SEDAR coordinators will monitor project deliverables (applied comprehensively, including working papers, data and report segments) to ensure items are provided as required in project schedule deadlines.
- Develop draft project schedules and Center for Independent Experts Performance Work Statements (CIE PWS) as needed in consultation with Cooperators and lead assessment agencies.
- May produce suggested participant lists in consultation with Cooperators and lead assessment agencies
- Notify Cooperators of their responsibilities under the SEDAR guidelines and Steering Committee policies, such as appointments and administrative approvals.
- Serve as the administrative contact for venue staff during SEDAR workshops.
- Provide initial point of contact for travel-related issues involving SEDAR appointees.
- May assist the Cooperator with set-up and manage AV and recording equipment during SEDAR meetings and workshops.
- Organizes SEDAR – lead webinars.
- Distribute Travel Orders, meeting notices, and reminders to workshop and webinar participants.
- Submits notices to the Federal Register for SEDAR meetings, webinars, and workshops.
- Manage SEDAR website postings.

2.5 Cooperator Obligations

The following is a general description of primary SEDAR staff responsibilities. Some of the listed Cooperator obligations are further detailed in **Section 5 SEDAR Approach**.

- Each Cooperator shall draft the Terms of Reference (TORs) in collaboration with the lead assessment agency. The Cooperator may include review of such documents by their technical and advisory bodies as part of their approval process. Once finalized, the Cooperator will provide to the SEDAR Coordinator, via a memo, a copy for posting to the SEDAR website.
- Each Cooperator will appoint workshop participants following their appointment processes.
- Each Cooperator may provide notices of workshops and SEDAR activities, through press releases, mailing lists, or newsletter notices, as they deem appropriate.
- Each Cooperator shall identify a designated staff contact to serve as a lead contact and liaison between their organization and SEDAR Staff for all SEDAR projects involving their organization. This designee shall be responsible for:

- Ensuring Cooperator administrative responsibilities, such as TOR approvals and panel appointments, are addressed as specified in the project schedule.
- Notifying the SEDAR Coordinator in writing of completion of administrative tasks.
- Assisting the SEDAR Coordinator in ensuring their organization's appointees meet deadlines for data and document submissions.
- Assists SEDAR Staff in room or diagram set-up and AV equipment based on the type of SEDAR workshop. Provides administrative support throughout the workshop based on the specific cooperators.

- Each SEDAR Cooperator shall establish guidelines and procedures for approving TORs and panel appointments.
- Invitations to appointed participants shall be issued by the Cooperator so it is clear which organization is responsible for the appointment.
- Cooperators shall provide written notification to the SEDAR Coordinator of TOR approval and a list of appointed participants and contact information.
- Each Cooperator(s) will collaborate with the appropriate analytical team to determine how SEDAR assessment products are presented to its technical, advisory, and management bodies.

3 SEDAR Panel Participant and Appointment Process

The following outlines the categories of participants in SEDAR workshops and webinars and the respective cooperator led appointment process.

- Workshop participants and attendees include:
  - Panelists: Individuals appointed by a Cooperator to a workshop panel or process group, who are responsible for participating in workshop discussions, deliberations, consensus building, and documentation. May also be responsible for submitting data and analyses in support of the assessment.
  - Appointed Observers: Individuals appointed by a Cooperator to observe a workshop/process and provide guidance as requested by the workshop panel. This group may include Council members, Cooperator staff, and AP representatives. These individuals do not contribute to consensus building or workshop reports.
  - Staff: Individuals providing support to a SEDAR project, often includes SEDAR and Cooperator staff.
  - Attendees: Any individual who attends a workshop on their own initiative without any Cooperator appointment.
- Each Council and HMS shall establish a SEDAR AP from which participants (panelists and appointed observers) shall be selected for each workshop. Note: provisions related to the SEDAR AP do not apply to the Interstate Fisheries Commissions.
- The SEDAR AP is governed by the same requirements as other Council Aps and should be included in each Council's SOPPs. Each Council and HMS shall establish a process for making SEDAR AP appointments.
- Each Cooperator shall establish a process for making SEDAR workshop appointments.
- The Cooperator requesting the assessment and having jurisdiction over the species assessed is responsible for appointing those panelists and observers it deems necessary to fulfill the TORs.

- Each Cooperator shall ensure that all panelists and appointed observers are members of the Cooperator's SEDAR AP and therefore eligible to participate in SEDAR.
- The SEFSC Director and SERO Administrator are responsible for designating agency employees to participate in SEDAR projects to provide expertise, data, and analyses, and represent their offices as appropriate.
- In the event of joint jurisdiction, each Cooperator with an interest makes appointments from within its SEDAR AP.

4 Public Participation

The following outlines how the public may participate in the SEDAR process, including webinar and workshop access and opportunities for oral and written public comments.

- SEDAR is a Council process, with public participation during workshops and other meetings governed by Council policies and practices.
- SEDAR workshops and other meetings are open and accessible to the public, subject to the standards and procedures of the Cooperators and provisions contained in this document.
- Members of the public who attend workshops or meetings are noted in workshop reports as attendees and are expected to sign-in on the roll each day of attendance. All written comments submitted during the SEDAR process will become part of the SEDAR Administrative Record.
- In-person oral public comment will be taken during SEDAR workshops and webinars and Steering Committee meetings at specific times indicated on workshop and meeting agendas, or at an appropriate time determined by the workshop Chair.
- Written comments will be accepted using the online form found on the SEDAR website. Comments received later than one week prior to the workshop, until the close of the meeting on the next to last day of the workshop, will be provided to the panel at the workshop. Comments received after the conclusion of a project stage (e.g. data or assessment) will become part of the AR component for the next workshop in the project.
- After the conclusion of the SEDAR project, written comments should be submitted to the appropriate Cooperator in accordance with the stated policies of the Cooperators involved with the project. Those interested in submitting written comments are directed to contact the Cooperator involved in an assessment project for policies regarding written comment.

5 SEDAR Approach

The following outlines the overall SEDAR assessment process, including development of TORs, project scheduling and oversight, documentation and reporting requirements, the standards for consensus that guide panel recommendations, and final report dissemination.

5.1 General Process

- SEDAR assessments are developed through an open and transparent process which may consist of up to four separate stages. A report documenting findings and recommendations shall be developed at each stage within the process; all reports shall be compiled to create the overall Stock Assessment Report (SAR).
- The charge for each assessment project is specified in TORs.

- The Cooperator(s) should work with the lead assessment agency to develop the TORs for each project.
- Once approved, the Cooperator will submit the final version of the TORs to the SEDAR Coordinator for posting on the SEDAR website.
- Prior to developing the ToRs, the cooperator is responsible for negotiating the assessment components with the lead assessment agency.

- The SEDAR coordinator will draft the project schedule based on the lead assessment agency's data deadlines and will work with the lead agency to finalize the schedule.
- SEDAR coordinators will monitor project deliverables (applied comprehensively, including working papers, data and report segments) to ensure items are provided as required by project schedule deadlines.
- Council members attending as official representatives are considered appointed observers and may not serve as panelists.
- The lead assessment agency may appoint additional experts (such as university researchers, international experts, and NOAA Fisheries employees from outside the SE Region) for data and assessment stages as necessary to complete project TORs and ensure adequate expertise is available at each step of the process. Travel expenses for additional experts will be covered by the lead assessment agency.

5.2 Project Documentation and Dissemination

- All submitted materials are subject to public distribution and internet posting, except draft reports, as stated below, and data sets.
- Documentation consists of working papers prepared for each project stage, reference documents selected from published literature, and project reports.
- Documentation will be distributed electronically.
- Preliminary working papers will be identified as such, with language included on a cover page providing the date, submitter or author, and statement that the information is pre-decisional. Subsequent revisions should include the date of the revision and retain the original submission date.
- SEDAR does not specify the format or content of working papers.
- SEDAR is not a repository for data sets used in the assessment.
- Assessment and review stage presentations, prepared in advance of a meeting shall be posted to the SEDAR website. "Working" presentations developed during a meeting are not posted to the website due to their pre-decisional and informal nature.
- Draft reports will only be distributed to panelists, Cooperator staff, and appointed observers.
- Panelists are individually responsible for ensuring that their viewpoints and opinions are reflected in the panel report.
- Reports should provide clear rationale for panel decisions and recommendations and note associated uncertainties.
- The names and affiliations of all who attend meetings, including panelists, appointed observers, attendees and staff, will be disclosed in workshop documents.

- SEDAR panels are not approved for viewing confidential information. Confidentiality will be maintained in accordance with agency and data collector requirements for all submitted datasets, working papers, and workshop reports. Each author or data provider is personally responsible for maintaining confidentiality.
- The final SAR, including the reports of all SEDAR processes and any necessary addenda, shall be disseminated to the Cooperators involved in the project and the SEDAR Steering Committee through memorandum from the SEDAR Coordinator following completion of the project.
- Notice of the availability of the final SAR shall also be distributed to all individuals on the email distribution lists for all stages of the project.
- SEDAR involvement is complete once the final SAR is finalized and disseminated to the Cooperator.
- CTB and lead assessment agency staff may produce summary reports regarding a SEDAR assessment. Those reports should be forwarded to the appropriate SEDAR Coordinator for inclusion on the SEDAR website.
- Each Cooperator is responsible for subsequent distribution of SEDAR documentation to its panels and committees.

5.3 Science Based Decision Making

- SEDAR recommendations shall be achieved through consensus of the panel in attendance at the meeting and participating virtually, rather than formal votes. Consensus recommendations shall be structured to ensure that the full range of opinions, variability and uncertainty is reflected in the report.
- SEDAR recommendations are advisory in nature. The lead assessment agency makes a final determination regarding incorporation of recommendation into the assessment.
- SEDAR panels shall consider biological and technical aspects of datasets and stock assessments and base recommendations upon the scientific merit of the alternatives proposed.
- SEDAR panel decisions are not to be based on possible management outcomes or regulatory impacts. At no point should a SEDAR panel consider such concerns.
    - Participants, whether panelists or observers, who embark upon discussions of management implications or regulatory consequences beyond those needed to address the TORs will be notified by the Chair that such deliberations are beyond the scope of SEDAR and explicitly and intentionally prohibited.
    - If such issues continue to be raised and notices to the contrary are ignored, the Chair, Council staff, and Council members present are authorized by the Steering Committee to ask the offending individual to leave the meeting.
    - If the individual refuses to leave upon such a request, the Chair shall be under no obligation to recognize them during further panel discussions.
    - Assessment panels and working groups shall consider the technical guidance provided in NOAA Technical Memorandums (e.g. NMFS-F/SPO-261 or current version), NOAA policy directives, and SEDAR procedural guidance.

5.4 Meeting Policies

- SEDAR assessment projects may be completed through in-person workshops, webinars, conference calls, or a combination of all these approaches.
- SEDAR meetings will be noticed by SEDAR Coordinators in the Federal Register in accordance with the noticing requirements of the Magnuson-Stevens Act.
- All plenary sessions at SEDAR meetings and webinars are recorded. Recordings are retained for the Administrative Record. Preparation of written transcripts of SEDAR projects and Steering Committee meetings may be requested in writing by any SEDAR Steering Committee member.
- All panelists are expected to actively contribute to the process (e.g. by reviewing documentation, preparing supporting analyses, contributing documents and datasets, participating in discussions, and producing report text).
- Participants are expected to provide alternative solutions along with any criticisms and work toward consensus while conducting themselves with respectful and professional behavior. No personal attacks or aggressive behavior will be tolerated from any participants, or members of the public, and those who persist in such actions will be asked to leave.
- SEDAR panels are expected to reach consensus decisions, which may include acknowledging multiple approaches for addressing issues and unknowns. Voting is not conducted.
    - If consensus cannot be reached, then alternative viewpoints, approaches, and concerns should be acknowledged in the report. In the final report, the lead assessment agency shall describe the final approach taken and the rationale.
- Panelists and appointed observers are expected to sign-in daily during meetings.
- In-person participation is preferred at workshops, especially for key personnel such as the lead analyst, working group leads (at Data Workshops) and members of the Review Panel.
    - SEDAR will broadcast data and review workshop plenary sessions for in-person workshops. This will be a broadcast-only feature for observers not in attendance to observe the proceedings.
    - Panel members participating virtually will be able to fully participate and engage, by raising their hands and contributing to the discussions.
    - It is recognized that emergencies occur and exceptions to virtual participation may be accommodated on a case-by-case basis.
- If an individual Cooperator is interested in holding a hybrid meeting, they may work with SEDAR Staff to address the logistical requirements. The Cooperator is required to provide the logistical and financial support needed for a hybrid meeting that exceeds the regular meeting needs.
    - A hybrid meeting is defined as a meeting where the expectation for in-person participation is removed. Appointed participants are able to individually choose whether to participate by attending the meeting in person, or by attending virtually.
    - Hybrid meetings should be identified and planned for during initial project planning steps.
    - In the event a need arises for a hybrid meeting that was not considered in advance, requests for a hybrid approach should be provided to the SEDAR Coordinator with ample advance notice to ensure they can be accommodated prior to the workshop.

6 SEDAR Assessment Components

Once a species or stock is selected for an assessment through the SEDAR process, the specifics of the project must be negotiated and agreed to by the lead assessment agency and the Cooperator who has jurisdiction over the species/stock to be assessed. The determination of which components to include is based on the information available for consideration. All SEDAR projects are intended to provide reliable and robust assessment products. The following outlines the components available to a cooperator for a SEDAR assessment.

6.1 Data Stage Components

Cooperators, in collaboration with the lead assessment agency, should select from the options below which data components should be incorporated into the process for each assessment being conducted through SEDAR. In addition to the components described below, there are various steps in the data stage of the SEDAR process. Details of those steps may be found in Appendix 1.

6.1.1 Stock Identification

Stock Identification Process Details:

- Goal is to identify stock boundaries for a given assessment and should be completed before data provisioning begins.
- A Panel of individuals with relevant expertise (e.g. genetics, life history, landings) is appointed by the Cooperator to review information sources and provide recommendations.
- Coordinated by SEDAR, this process is noticed in the Federal Register and open to the public.
- Stock Identification analyses may not be needed for all assessments.

6.1.2 Topical Working Groups (TWGs)*

*Topical Working Groups may be utilized at the data or assessment stage of the process (or both).

Topical Working Group Details:

- Small working groups assembled to discuss and make recommendations on specific data topics or modeling approaches identified in the TORs for a given SEDAR project.
- Intended to be used to review and provide recommendations on the use of new data streams, data analysis, or modeling approaches not used in the previously approved assessment.
- Discussion is limited to data topics specifically identified in the TORs.
- TWGs may be comprised of members of the analytical team, SSC or other Cooperator Technical Bodies, stakeholders, and other technical experts.
    - Cooperators will appoint individuals to serve on specific TWGs for a given assessment, following their approved SEDAR appointment procedures.
    - Multiple groups may be needed if expertise does not overlap topics being discussed.
- TWGs meet through a short series of publicly noticed webinars to discuss relevant topics, provide feedback, and finalize recommendations. These webinars are open to the public and follow standard SEDAR procedures.
- The appointed participants may meet by telephone, email, or virtual meetings to facilitate discussions, with final decisions reviewed during the public webinars or workshops.

- While anyone can attend the publicly noticed webinars hosted by SEDAR, to participate in the above discussions, participants must be appointed to the TWG by a Cooperator.

- Timing of the TWG needs to be such that the report documenting the discussions and recommendations is available in time for the analytical teams to incorporate the information into the assessment. Timing will need to be considered when the Project Schedule is developed.
- Discussions and recommendations must be documented.
    - Writing responsibilities will depend on the topic, and in most cases, an expert on the topic will take the lead on producing the documentation, with support from other members of the TWG.
    - Each TWG shall select a rapporteur to take notes during the webinars.
    - Documentation may be presented in a working paper or as part of the SAR.
    - Additional working papers and reference documents may be provided as needed in support of TWG discussions.
- Webinars will be chaired by lead assessment agency staff, though they may choose to appoint another Technical Chair to serve in that role for a specific assessment/topic.
- The process will be organized via webinars. Webinars are noticed in the Federal Register and open to the public, serving as part of the public record for decision making.
- It is expected that personnel from the lead assessment agency and other collaborators (data providers and analytical team representation) will be involved in TWG discussions.

6.1.3 Data Webinars Approach

Data Webinar Process Details:

- Conducted when there are multiple data streams that would benefit from broader open discussions and recommendations than provided using the TWG approach but less than what is provided by a Data Workshop approach.
- Intended to be used to review and provide recommendations on the use of new data streams or data analysis approaches not used in the previously approved assessment, as specified in the TORs.
- Panel may be comprised of SSC or other CTB members, stakeholders, analysts, and other technical experts.
    - Cooperators will appoint individuals to serve for a given assessment, following their approved SEDAR appointment procedures.
- Discussions and recommendations must be documented.
    - Writing responsibilities will depend on the topic, and in most cases, an expert on the topic will take the lead on producing the documentation, with support from other members of the Panel.
    - Documentation may be presented in a working paper or as part of the SAR.
    - Additional working papers and reference documents may be provided as needed in support of the Panel discussions.

- The process will be organized via webinars and follow standard SEDAR procedures. Webinars are noticed in the Federal Register and open to the public, serving as part of the public record for decision making.
- Webinars will be chaired by lead assessment agency or SEDAR staff, though Cooperators may choose to appoint another individual to serve in that role for a specific assessment/topic.

6.1.4 Data Workshop

Data Workshop Process Details:

- Data panelists shall assemble in person or virtually and critique all available fishery data, monitoring programs, and life history information. In-person workshops may have the potential for limited virtual participation as needed (See Section 5.4).
- Data panelists should compile necessary data and working papers per project deadlines so that meeting time can be spent reviewing and revising datasets. Working Papers and initial data summaries are desired at least 2 weeks prior to the data workshop.
- Data workshops and webinars may be chaired (facilitated) by the SEDAR Coordinator. A Cooperator may choose to contract an individual other than the SEDAR Coordinator to serve as the Chair for the Data Workshop. Should they choose to do so, SEDAR will cover travel expenses, however the Cooperator would be responsible for any stipend required.
- Data panelists may include database managers, data specialists, and data collectors; life history researchers and biologists; and stock assessment scientists from States, NOAA Fisheries, Interstate Commissions, universities, independent laboratories and institutions; and Cooperator's SEDAR AP (commercial, recreational, and/or NGO) representatives.
- The data stage will be structured around working groups devoted to primary data areas. Working groups shall review data, working papers, reference documents, and other information to develop recommendations for consideration by the data panel on analyses, assumptions and data for inclusion in the assessment.
- Each working group shall select a rapporteur to take notes during workgroup and plenary sessions.
- All decisions of the Panel are made during the plenary sessions by consensus.
- A workshop report documenting the discussions and recommendations of the Panel shall be produced.
- Data workshops are coordinated by SEDAR, noticed in the Federal Register and open to the public.

6.2 Assessment Stage Components

Cooperators, in collaboration with the lead assessment agency, should select from the options below which assessment process components should be incorporated into the process for each assessment conducted through SEDAR.

6.2.1 Assessment Panel Webinars

Assessment Panel Webinar Details:

- An Assessment Panel will be appointed that includes representatives of the appropriate Cooperator and lead assessment agency. The Assessment Panel is a technical body and therefore comprises scientists qualified to evaluate and provide recommendations on stock assessments.
- An Analytical Team will be appointed by the lead assessment agency, to include a designated lead analyst and other support staff as deemed necessary by the agency. The Analytical Team is part of the Assessment Panel.
- A group of industry stakeholders may be appointed by the appropriate Cooperator to provide guidance on fishery practices as requested by the Assessment Panel. The appointed observers must be chosen from the Cooperator SEDAR AP unless the Cooperator is exempt from that requirement as specified elsewhere in this document.
- The Assessment Panel shall provide guidance to the Analytical Team on assessment models, model configuration, and uncertainty evaluation. The Assessment Panel is expected to identify a preferred model configuration that meets the TORs and is appropriate for providing management advice.
- Assessment decisions will be approved by consensus of the Assessment Panel. The Panel should consider input of the appointed observers as appropriate.
- The Assessment Panel is expected to compile necessary data and working papers in advance of the panel meetings so that time can be spent discussing and evaluating progress toward milestones.
- Assessment webinars are coordinated by SEDAR, noticed in the Federal Register and open to the public.
- Assessment Stage meetings may be facilitated by the SEDAR Coordinator or an individual appointed by the Cooperator.
- A report documenting data updates, assessment modeling efforts, diagnostics, and results shall be produced and submitted for review either through the External Peer Review process described in Section 6.3 or by the appropriate Cooperator's SSC, prior to being used for management advice. This review is required to meet the peer review standards of the BSIA Framework.

6.2.2 Agency-Led Internal Assessment Development Process

Agency-led Internal Assessment Process Details:

This assessment approach is conducted external to SEDR but is addressed here to document all assessment approach options.

- Lead assessment agency develops the assessment without structured input from an assessment panel, using the data streams recommended through the data stage of the project (where applicable).
- Intended to be used primarily for simple assessment approaches or rapid updates of previously approved assessments where little review is needed and timeliness is of paramount concern.
- The lead assessment agency may request the Cooperators to recommend individuals with the relevant scientific expertise and fishing experience who would be available to provide feedback as needed during model development.
- A report documenting data updates, assessment modeling efforts, and results shall be produced and submitted for review either through the External Peer Review process described in Section

6.3 or by the appropriate Cooperator's SSC, prior to being used for management advice. This review is required to meet the peer review standards of the BSIA Framework.

Optional Pre-decisional Briefing to CTB:

- For the Council Cooperators, the lead assessment agency would deliver an assessment development update to the SSC. This presentation will highlight key decision points, and the SSC will be asked for feedback prior to the completion of the assessment. The lead assessment agency will work with Council Cooperators to schedule this check-in several months in advance.
- For HMS assessments, the agency will work internally as appropriate.

6.3 External Peer Review Stage Components

Cooperators, in collaboration with the lead assessment agency, should select from the options below which external peer review process components should be incorporated into the process for assessments conducted through SEDAR.

External Peer Review Details:

- The review process shall provide an independent peer review of SEDAR stock assessments. The intent of the review is to ensure that the assessment and results are scientifically sound and that decision makers are provided adequate advice that reflects uncertainties in the data and methods.
- Peer reviews may be conducted through Review Workshops or through a desk review process. Specific guidelines for each type of review are provided in the next section.
- Desk reviews are generally not preferred due to the lack of interaction between reviewers and those who prepared the material under review.
- Desk Reviews may be considered if a project falls behind and convening a Peer Review Workshop will add additional delay, where the nature and scope of the assessment are conducive to a desk review approach, or where funding precludes an in-person or virtual review workshop.
- Desk reviews may be requested through the initial TORs for a project or during a project if the analysis progresses such that a desk review is considered appropriate by the Cooperator and lead assessment agency.
- All reviewers shall be independent from the assessments and data under review. Conflict of Interest forms for reviewers appointed by the CIE are handled by NOAA Fisheries CIE project managers.
- Review panels may not conduct alternative assessments. Panels may request additional sensitivity runs and minor corrections. Results of such runs should be documented in addenda to the assessment report.
- Assessment findings will be presented to the review panel by the lead assessment agency with support of other assessment panel members as appropriate and necessary.
- The review panel shall not provide specific management advice. Review panel recommendations are advisory in nature.

6.3.1 Review Workshop Process

- The review workshop may be conducted in person or virtually.

- Review Workshop Panels shall typically be composed of:
    - 3 reviewers appointed by the Center for Independent Experts (CIE).
    - 2 reviewers from the Cooperator having jurisdiction over the stocks under review, if desired by the Cooperator.
    - Optionally, for a joint stock, 1 reviewer appointed by each Cooperator having jurisdiction over the stocks under review.
- The Review Workshop Chair will be appointed by the Project Cooperator. If there are multiple Cooperators involved, they shall decide which will appoint the Chair when the SEDAR Steering Committee reviews the annual SEDAR Project Plan. It is recommended for Councils that the Chair be a member of the Cooperator's SSC or other scientific.
- Review Panels involving multiple Cooperators should be composed of equal Cooperator appointees. For a typical project involving two Cooperators, one will appoint a chair and reviewer, and one will appoint two reviewers.
- Review Workshop Chairs are facilitators, not reviewers. Chairs are responsible for conducting the workshop, compiling the Review Panel report, providing an executive summary of review activities for the report, arranging for panel review of the report and submitting the final review panel report to the SEDAR Coordinator once it is approved by the Review Panel.
- Only the Review Panel and Review Workshop Chair participate in report development and review, unless otherwise requested by the Cooperator.
- Each Cooperator may appoint observers to a review workshop. These may include representatives of the Council, additional scientists, or constituent representatives. All appointed observers must be members of the Cooperator's SEDAR AP. Observers do not participate in deliberations during the review. However, Panelists and the Chair may direct questions to them as necessary.
- If a Review Panel finds an assessment deficient to the extent that technical staff present cannot correct the deficiencies during the course of the workshop, or the Panel deems that desired modifications would result in an alternative assessment, then the Review Panel shall provide in writing the required remedial measures and suggest an appropriate approach for correcting the assessment and subsequently reviewing the corrected assessment.

6.3.2 Desk Review Process

- Desk reviews refer to written reviews conducted by individuals, working on their own outside of any workshop process and without any presentation of methods and results beyond that contained in the assessment reports.
- Desk reviews shall be conducted by 3 reviewers appointed by the CIE, if possible. The Cooperator may appoint an additional reviewer at its discretion.
- Each Cooperator shall develop a process and guidelines to assist its technical bodies in addressing desk review findings and recommendations.

6.3.3 Hybrid Desk Review Process

- The review panel and analytical team will convene via webinar for a presentation of the assessment.

    - This will allow for clarifying questions regarding the assessment prior to the reviewers conducting their independent peer reviews.
    - There will be no communication between the reviewers and analytical team after this webinar concludes.
- Desk reviews shall be conducted by 3 reviewers appointed by the CIE, if possible. The Cooperator may appoint an additional reviewer at its discretion.
- Each Cooperator shall develop a process and guidelines to assist its technical bodies in addressing desk review findings and recommendations.

7 Relation to State Agencies

- State agencies may request SEDAR peer review of assessments conducted by their staff or through contract for federally managed species.
- SEDAR Staff may support the state agency during data and assessment phases of the process if feasible; SEDAR projects will take precedence, however.
- SEDAR Staff will serve as a liaison between the state agency and the other Cooperators for purposes of reviewing schedules, TORs, and accommodating Cooperator appointees.
- The Steering Committee may also request that state agencies provide analytical lead in developing assessments through SEDAR, especially with regard to species found primarily within one state's boundaries.

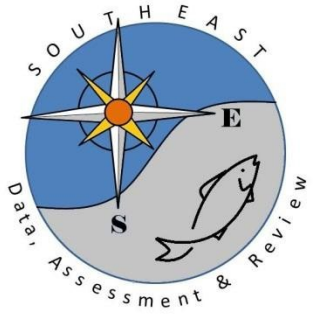
8 Additional Considerations for NOAA Fisheries Highly Migratory Species Management Division Assessments

This section outlines the assessment procedures unique to NOAA's Fisheries Highly Migratory Species Management Division (HMS), including this division serving both science and management roles.

- For the HMS Management Division, NMFS staff shall review the report and process and determine whether the assessment findings are adequate for management.
- Staff may request further evaluation of assessment uncertainties and alternative projection scenarios if deemed necessary for management.
- As HMS does not have a CTB to provide a review, the appropriate level of peer review will be determined for each assessment.
- If designated HMS staff determine that an error or omission has been made in the assessment model or in any input datasets, determine that such issues significantly impact the assessment results, and upon consideration of the magnitude and direction of required management actions that may be impacted by the error or omission, said staff shall prepare a written report for submission to the lead assessment agency that details (1) the nature of the concerns, including appropriate documentation of the correct information; (2) possible impacts; (3) specific concerns related to the issues raised, including the estimated parameters that are affected; and (4) the recommended process and timeline for correction or revision, review, and reconsideration by NMFS.
- Upon completion of its review, NMFS shall consider the SEDAR assessment findings and the results of any additional supplementary analyses requested in developing specific management recommendations as the best scientific information available.

- Members of the analytical team will assist the HMS Management Division in making a presentation of the assessment to the HMS AP either during or after the NMFS review and recommendations phase.

Standard Operating Policies and Procedures
APPENDICES



SouthEast Data, Assessment, and Review

Cooperative Stock Assessment Development and Review Program of:

NOAA Fisheries Southeast Fisheries Science Center
NOAA Fisheries Southeast Regional Office
South Atlantic Fishery Management Council
Gulf Fishery Management Council
Caribbean Fishery Management Council
Atlantic States Marine Fisheries Commission
Gulf States Marine Fisheries Commission
Florida Fish and Wildlife Conservation Commission
NOAA Fisheries Highly Migratory Species Management Division

SEDAR
4055 Faber Place #201
North Charleston, SC 29405

Approved: 20 July 2026

Appendix 1 - SEDAR Coordinator Responsibilities

SEDAR Coordinators are significantly involved in finalizing details for an assessment process once a project is added to the SEDAR schedule. The information below highlights the details and timelines for various roles and responsibilities.

I. Tasks Prior to the Start of the Assessment

Prior to the start of an assessment, the SEDAR Coordinator will work with Cooperator staff and the lead assessment agency, as appropriate, to complete several preparatory tasks that are in support of and critical to assessment planning and implementation. In all cases, the SEDAR Coordinator notifies the appropriate personnel of the need to complete the task; provides examples and templates, if needed; answers any process question; ensures the SEDAR process is followed; and ensures all deliverables are met within the timeline. The specific tasks and relevant details are described below.

Terms of Reference Development

- **Timeline**: Start 1 to 1.5 yr prior to start of assessment
- Terms of Reference (TOR) developed between Cooperator staff and lead assessment agency
- TORs approved according to Cooperator procedures
- Cooperator staff submit memo with final TORs on Cooperator letterhead to SEDAR staff
- SEDAR Coordinator posts final TORs to SEDAR website

Assessment Project Schedule

- **Timeline**: Start 1 year prior to start of assessment
- SEDAR Coordinator will draft project schedule in consultation with lead assessment agency and key data providers
- The project schedule will be based on assessment components documented in the TORs
- Once a project schedule is approved by the lead assessment agency, SEDAR Coordinator will post final project schedule to SEDAR website

Participant Appointments

- **Timeline:** Start 1 to 1.5 yr prior to start of SEDAR stage that participant is appointed to
- SEDAR Coordinator will send Cooperators memos requesting participants for upcoming assessment
- Participants appointed according to Cooperator procedures
    - Cooperator will submit memo to SEDAR Coordinator identifying appointed participants
    - Cooperator will provide complete contact details for appointed participants
- SEDAR Coordinator will coordinate with SEFSC SEDAR Data Coordinator for federal participants
    - SEFSC SEDAR Data Coordinator will submit spreadsheet to SEDAR identifying appointed federal participants
- Preferable for Cooperator to name participants to all stages at the same time

- SEDAR Coordinator will develop email distribution list for each stage of the project
- Send an email indicating appointment (~2-3 months prior to process beginning)
- Include project schedule and TORs

Supporting Documentation

1. Management History
   - **Timeline**: Start ~10 months before Data Scoping; must be complete by the Data Scoping webinar
   - Cooperator staff works with appropriate fishery managers (e.g., SERO staff, state staff) to complete
   - Management history will be included in Section 1 of SAR; does not get working paper number
2. Assessment History
   - **Timeline**: Start ~1 month before assessment stage; must be done by Data Finalization/Pre-Assessment webinar
   - Prepared by Lead Analyst or agency
   - Assessment history will be included in Section 1 of SAR; does not get working paper number

II. During an Assessment

During an assessment, the SEDAR Coordinator will complete administrative tasks needed to facilitate SEDAR led workshops and webinars. This facilitation role includes, but is not limited to, posting documents and public comments on the webpage; ensuring participants are aware of in-person and virtual public comments opportunities; and keeping the record of who attended the various workshops and webinars.

Webinar Logistics

Webinar Date and Time Selection

- The week of the webinar is identified in the project schedule
- The SEDAR Coordinator will develop an online poll to determine participant availability
- The webinar date and time is selected based on the poll responses
- The SEDAR Coordinator notifies the participants of the date and time and provides webinar registration information
- SEDAR Coordinator will prepare and submit FRNs according to SAFMC procedures, and maintain copies for administrative record

Workshop Logistics

Workshop Location and Dates

- The workshop dates are identified in the project schedule
- SEDAR Coordinator will consult with Cooperator and lead assessment agency to identify a preferred location
- SEDAR Coordinator will prepare and submit a meeting request form per SAFMC procedures 9-12 months prior to workshop

- Need to know number and location of participants to estimate the amount of meeting space and number of sleeping rooms that will be needed
- Include room layouts and equipment requirements
- SEDAR Coordinator will prepare and submit FRNs according to SAFMC procedures, and maintain copies for administrative record

Travel Information

- SEDAR Coordinator will send an email to appointed participants and interested parties with all necessary travel information, including:
    - Travel Order (TO) forms
    - Travel Authorization Notice (TAN) which includes information on lodging and meeting logistics
    - SAFMC Travel Guidelines
    - Workshop agenda

Workshop Materials

- SEDAR Coordinator will bring hard copies of the workshop agenda, TORs, sign in sheets (several for each day) and name plates

III. Center for Independent Experts Requests

The SEDAR Coordinator will complete necessary documentation for requesting appointees from Center for Independent Experts.

- SEDAR Coordinator will request CIE Performance Work Statement (PWS) from the NOAA CIE contact
- SEDAR Coordinator will add necessary SEDAR information then send it to the lead assessment agency and Cooperator for review
- Initial submitted request should include general information (number of reviewers needed, week of workshops, project title, meeting schedule)
- Final CIE PWS will be submitted to NOAA CIE contact approximately 9 months prior to review workshop

IV. Information Quality Act Peer Review Tracking

SEDAR Coordinator will ensure Information Quality Act Peer Review Tracking is completed and updated as needed.

- SEDAR Manager will complete an Information Quality Act (IQA) peer review tracking form for the projects that will have an independent external peer review organized through SEDAR
- The form is submitted to Office of Science and Technology Executive Officer
- SEDAR Manager will update the IQA forms as needed

V. Managing the SEDAR Website

SEDAR Coordinator will ensure the following documentation is posted to the SEDAR website and updated when appropriate. SEDAR requests that the documentation that Cooperators provide are 508 compliant.

Supporting Documentation:

1. Working Papers
   - Posted to the SEDAR website ~2 weeks prior to workshop
2. Reference Documents
   - Solicited from participants
   - Accepted throughout the assessment process
   - Includes published documents, previous SEDAR working papers, grey literature, etc. Anything developed for the present assessment is a working paper, not a reference document.
   - All reference documents are numbered sequentially throughout the process (not differentiated by workshop like working papers) and tracked on the master document list
3. Project Schedule
4. Document Lists
5. Final SARs
6. CIE reports

VI. After Assessment Completion

Following completion of an assessment, the SEDAR Coordinator will compile and distribute final products and complete any post-assessment tracking materials.

- Produce Review Workshop Working Paper that documents all virtually submitted public comments
- Once the final Stock Assessment Report (SAR) is posted to the SEDAR, the SEDAR Coordinator will send a notice of Availability of the final SAR memo will be distributed to the Cooperator, SEDAR Steering Committee, lead assessment agency and all participants involved in the process
- Research recommendations added to SEDAR consolidated research recommendations document
- Update the IQA peer review tracking document
- Once received, the SEDAR Coordinator will post the individual CIE reviewer reports

Assessment Updates

- Any assessment update materials (document list, working papers, reference documents, terms of reference, SEFSC SAR) will be posted to the previous assessment's webpage under "Project Post SEDAR Documentation" section

VII. Maintaining the Administrative Record

As SEDAR is a public process, the SEDAR Coordinator will maintain documents and meeting information for the administrative record.

- Federal Register Notice
- Memos to Cooperators
- Project Schedules
- Meeting Information
- Documentation (document list, working papers, reference documents)
- Workshop and Webinar recordings
- Participant List
- Final SARs
- CIE Reports

Appendix 2 – Data and Assessment Component Details

If specific SEDAR components are selected for an assessment, certain elements are included. The following outlines the standard details associated with each selected SEDAR component.

I. Data Workshop Component Details

If a Data Workshop is selected for an assessment, the following components will be included.

Data Scoping

Data Scoping Process Details:

- Initial step to identify potential data sets available for consideration during the assessment process and determine who will be responsible for data analysis.
- Webinar-based process – noticed in the Federal Register, open to the public.
- SEDAR coordinates this stage.
- Data panelists shall assemble virtually to discuss potential data streams for consideration in the process.
- Data used in previous assessment, as well as parties responsible for new sources of information expected, should be presented.
- Participants who will be responsible for analysis of individual data sources will be identified.
- Parameters for the assessment that may impact data provisioning are discussed and agreed to. Examples include areas, years to include, or size bins.

Pre-Data Workshop Webinar

Pre-Data Workshop Process Details:

- Final step prior to the Data Workshop to resolve outstanding data-related questions or concerns.
- Webinar-based process – noticed in the Federal Register, open to the public
- SEDAR coordinates this stage.
- Data panelists shall assemble virtually to raise questions or concerns about data that may require additional analyses.
- Data Workshop logistics regarding travel and meeting times will be discussed.

Data Workshop

Data Workshop Process Details:

- Data Workshop process details are documented in **section 6.1.4 in the SOPPs**

Post-Data Workshop Webinar

Post-Data Workshop Webinar Process Details:

- Final step in the Data Stage.

- Webinar-based process – noticed in the Federal Register, open to the public.
- SEDAR coordinates this stage.
- Data panelists shall assemble virtually to discuss data decisions that were not finalized at the Data Workshop.
- The transition from the data stage to the assessment stage is discussed in detail.

II. Assessment Panel Webinars Component Details

If Assessment Panel Webinars are selected for an assessment, the following components will be included.

Pre-Assessment Webinar

Pre-Assessment Webinar Process Details:

- Initial step in the Assessment Stage to initiate modeling discussions and confirm scope and schedule.
- May include both Data panelists and Assessment panelists.
- Webinar-based process – noticed in the Federal Register, open to the public.
- SEDAR coordinates this stage.
- Data and Assessment panelists shall assemble virtually to discuss outstanding data analysis and will begin preliminary modeling discussions.
- The schedule for the Assessment stage and scope of Assessment stage will be discussed.

Assessment Webinars

Assessment Webinar Process Details:

- Assessment Panel Webinar process details are documented in **section 6.2.1 in the SOPPs**

III. Topical Working Group

If a Topical Working Group is selected for an assessment, the following components will be included.

Scoping

Scoping Process Details:

- Initial step prior to start of assessment to identify data providers for topics not covered by the SEDAR Topical Working Group.
- Lead assessment agency will coordinate this stage.

Topical Working Group Scoping Webinar

Topical Working Group Scoping Webinar Process Details:

- The initial SEDAR component for a Topical Working Group.
- Webinar-based process – noticed in the Federal Register, open to the public.

- Defines the data or assessment topic and why it is being considered.
- Identifies potential data sets available for consideration during the Topical Working Group and determines who will be responsible for data analysis.
- The Topical Working Group requests analyses from the lead assessment agency needed to address the topic given the available data sets.

Topical Working Group Recommendations Webinar

Topical Working Group Recommendations Webinar Process Details:

- Following the Topical Working Group Scoping Webinar, the lead assessment agency will present requested analyses.
- SEDAR coordinates this stage.
- Webinar-based process – noticed in the Federal Register, open to the public.
- The Topical Working Group will discuss whether the analyses meet their scoping request.
- The Topical Working Group will provide final recommendations to the lead assessment agency.

Appendix 3 – SEDAR Infographics

SEDAR staff have developed various infographics to provide a visuals of the SEDAR process.

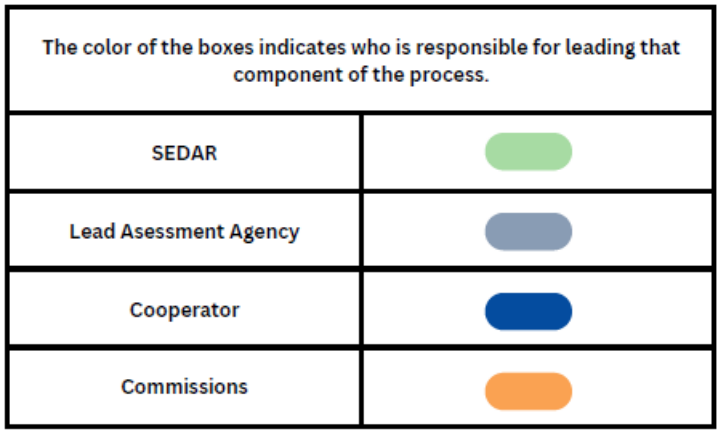
I. SEDAR Process with Responsible Parties

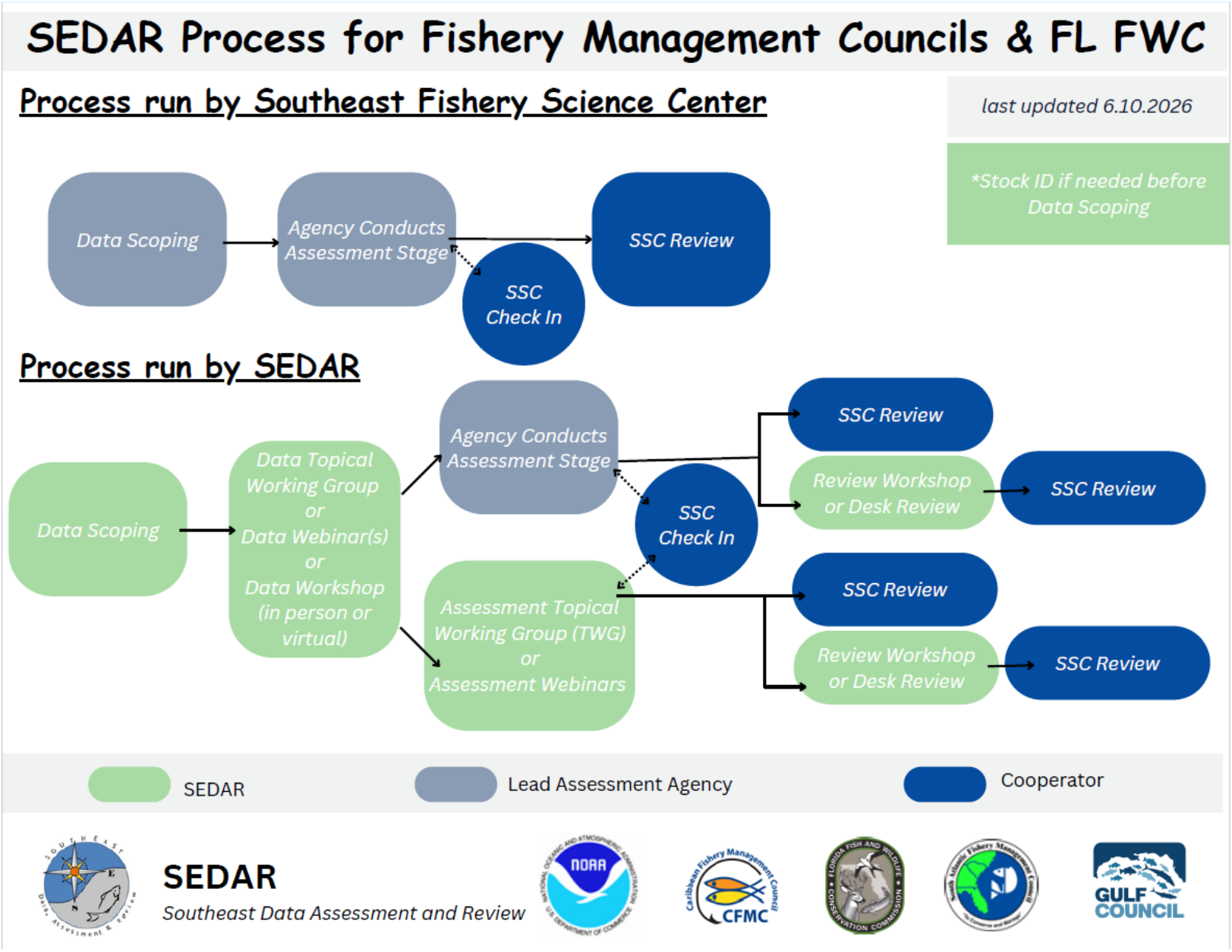
This infographic displays the SEDAR processes distinguished by Cooperator and responsible parties for the various components.

Figure 1: Schematic of the proposed SEDAR process changes as recommended by the SEDAR Steering Committee at their February 2025 meeting.

1a: Process for Fishery Management Councils and Florida Fish and Wildlife Commission

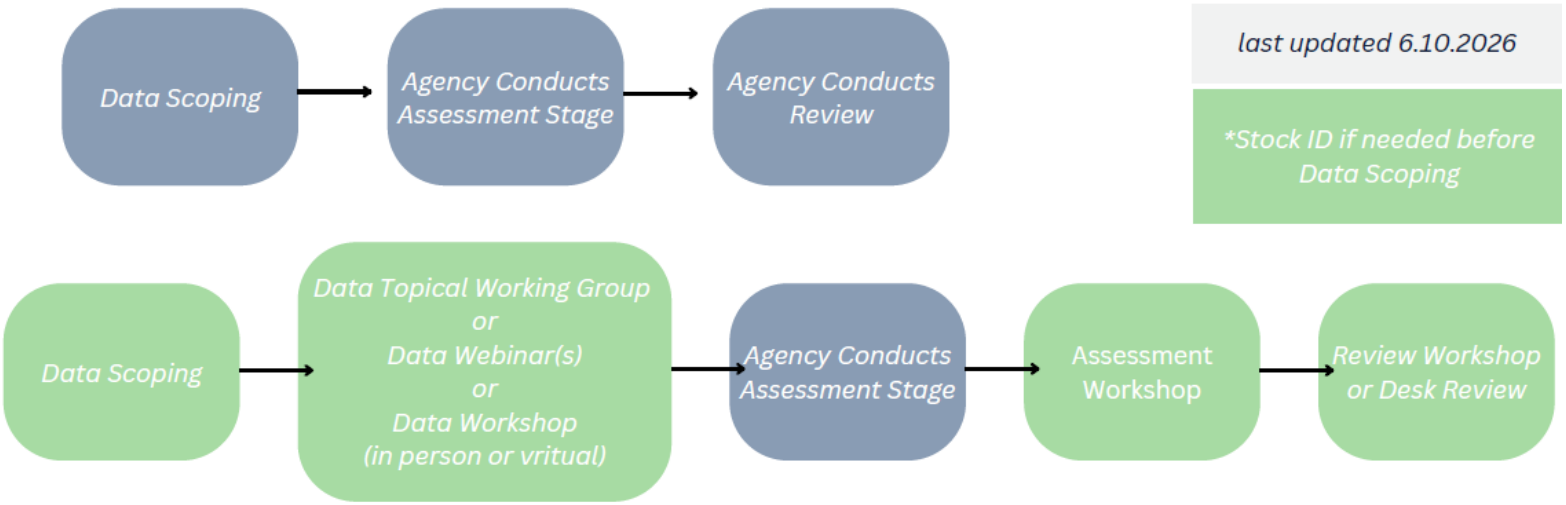
1b: Process for Highly Migratory Species and the Fishery Commissions



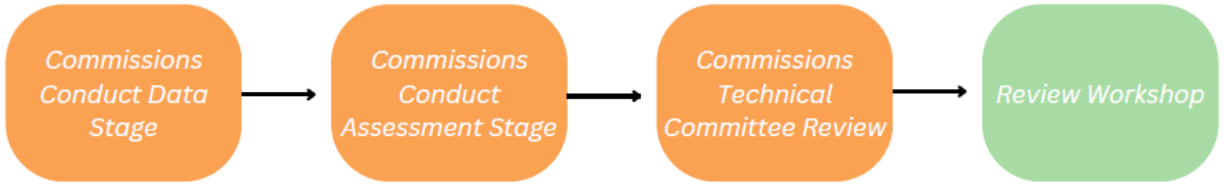

SEDAR Process for Fishery Management Councils & FL FWC
Process run by Southeast Fishery Science Center
last updated 6.10.2026
*Stock ID if needed before Data Scoping
Data Scoping
Agency Conducts Assessment Stage
SSC Review
SSC Check In
Process run by SEDAR
Data Scoping
Data Topical Working Group or Data Webinar(s) or Data Workshop (in person or virtual)
Agency Conducts Assessment Stage
SSC Review
Review Workshop or Desk Review
SSC Review
SSC Check In
Assessment Topical Working Group (TWG) or Assessment Webinars
SSC Review
Review Workshop or Desk Review
SSC Review
SEDAR
Lead Assessment Agency
Cooperator
SEDAR
Southeast Data Assessment and Review
NOAA
CFMC
GULF COUNCIL

SEDAR Process for Highly Migratory Species and the Commissions

Highly Migratory Species



Gulf and Atlantic States Marine Fisheries Commissions



SEDAR | Lead Assessment Agency | Commissions

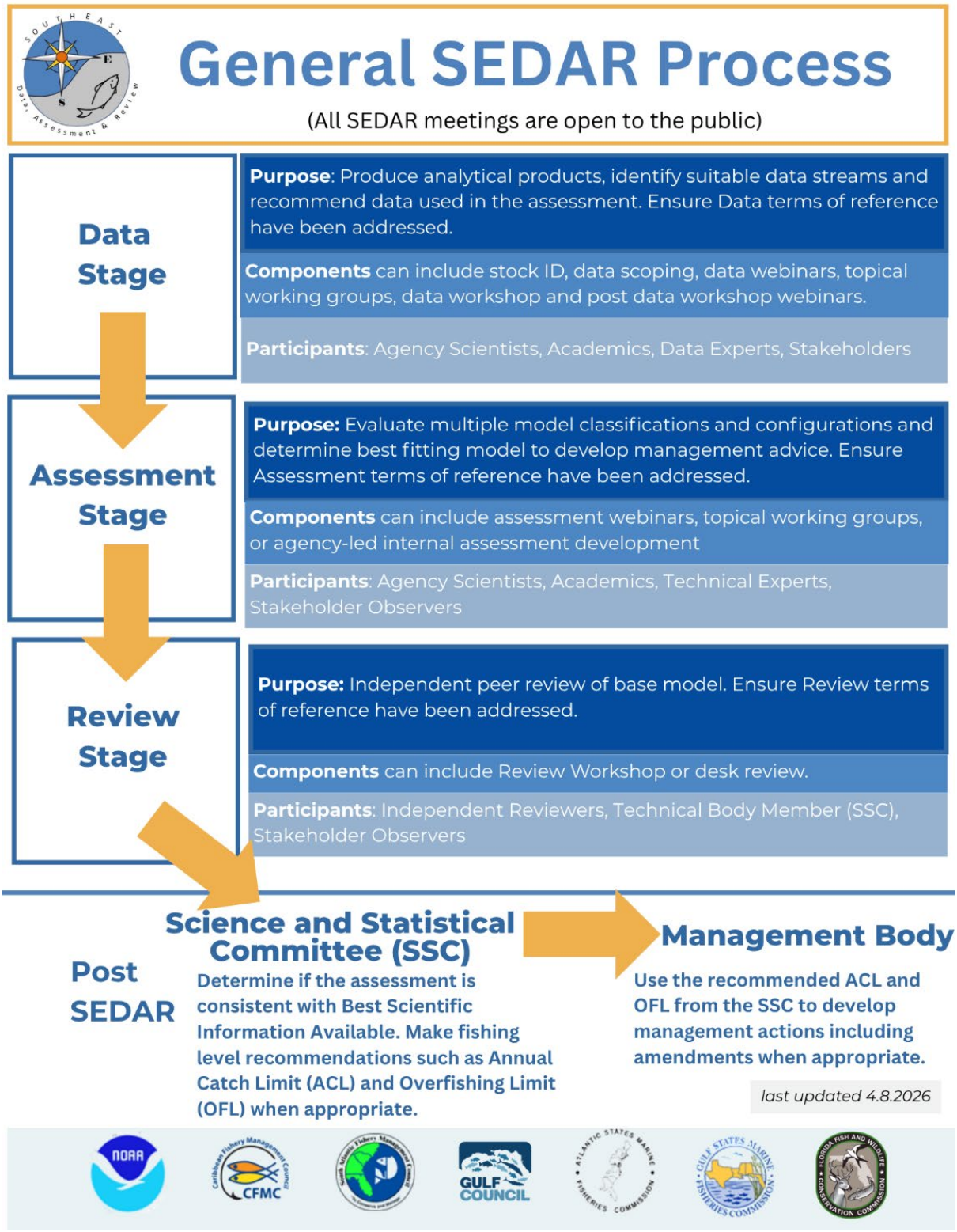
** the commissions may serve as the lead assessment agency **

SEDAR

Southeast Data Assessment and Review

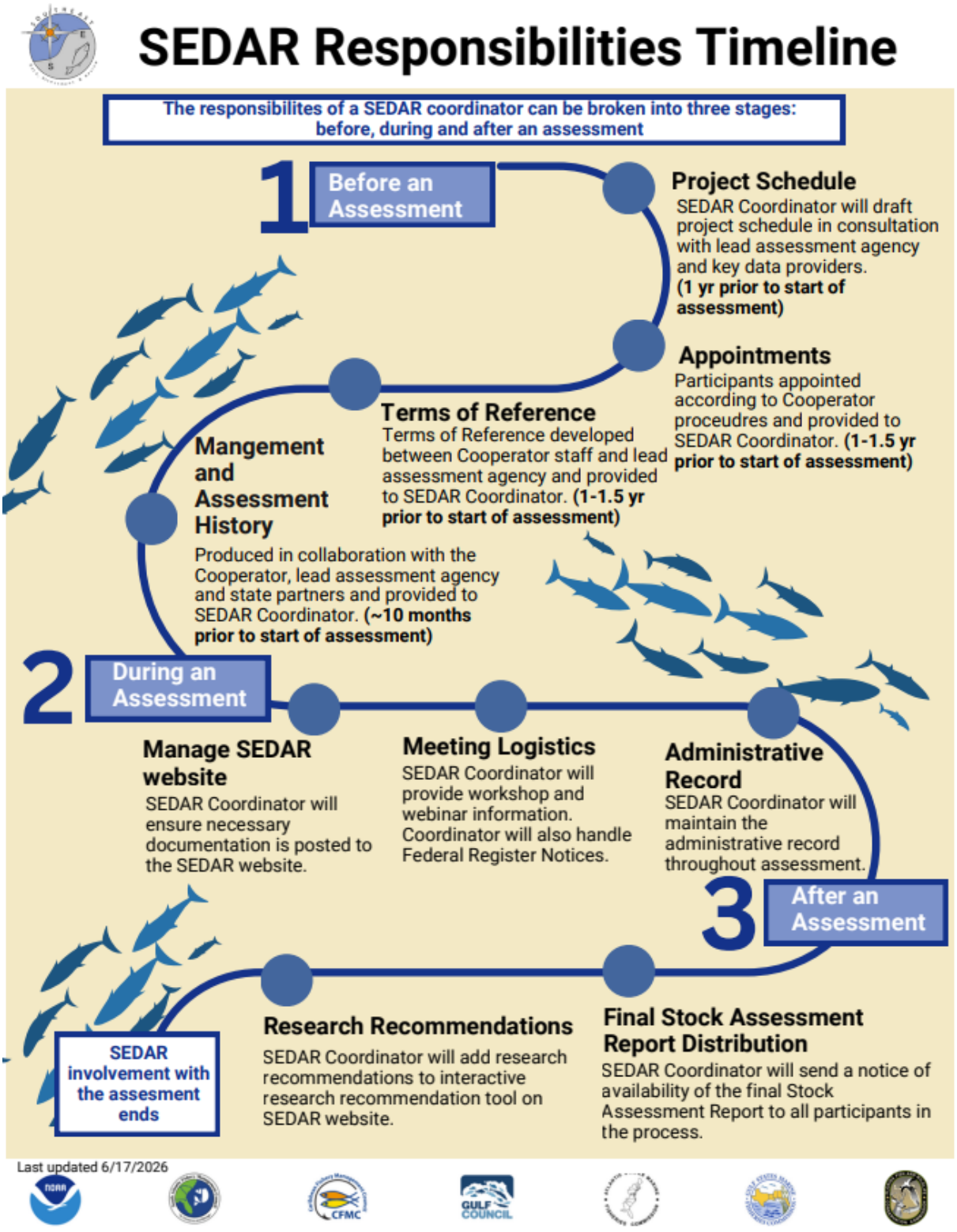
II. General SEDAR Process Stages

This infographic displays the various stages of SEDAR process.



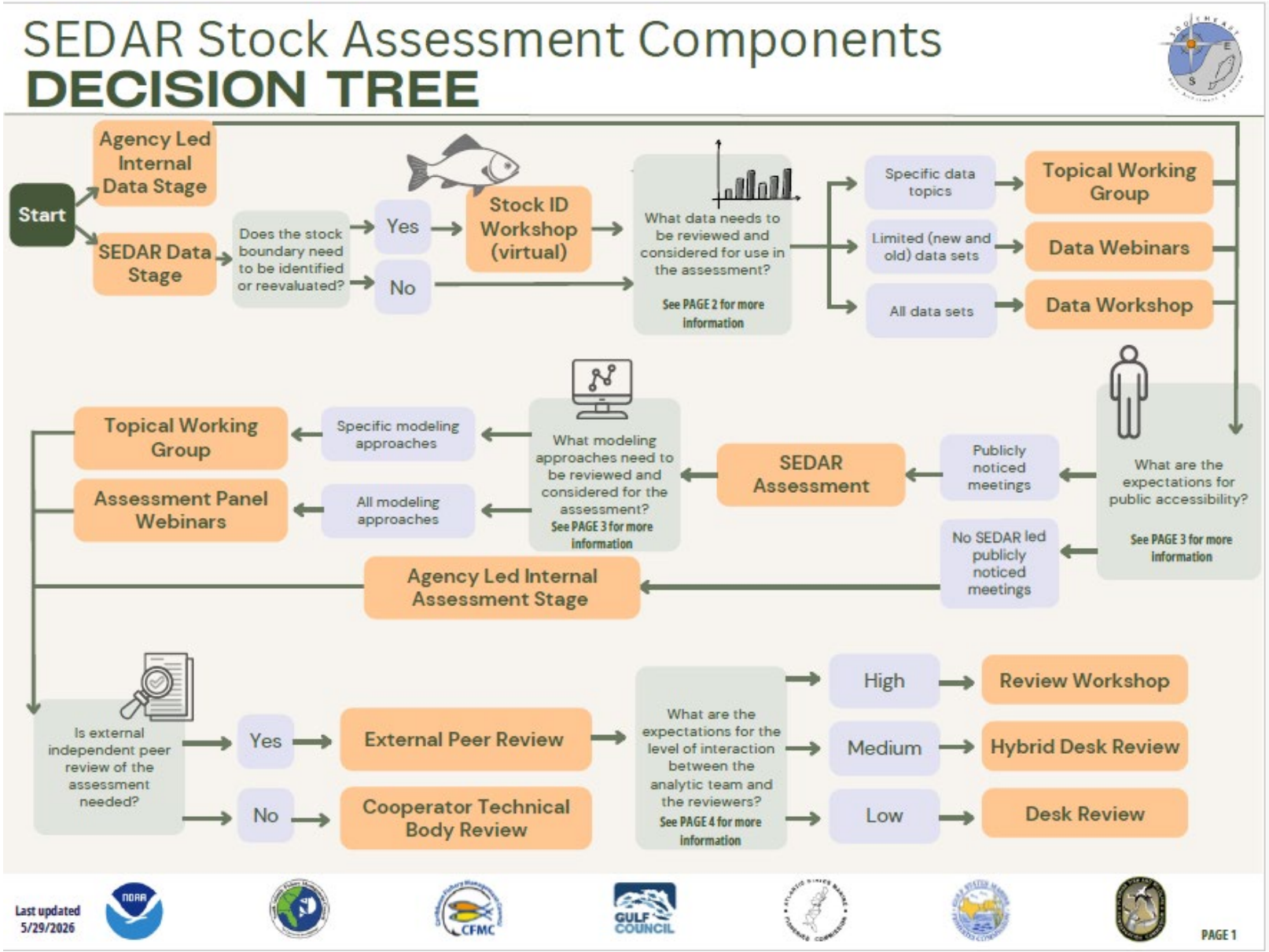
III. SEDAR Responsibilities Timeline

This infographic displays the responsibilities of a SEDAR Coordinator to facilitate an assessment.



IV. SEDAR Stock Assessment Components Decision Tree

This infographic displays the various SEDAR components offered to Cooperators for an assessment.



Data Components

Details	Topical Working Group	Data Webinars	Data Workshop
Stock Identification	• N/A	• If needed	• If needed
Data Scoping	✓	✓	✓
Participants	• Small working group comprised of assessment team, SSC members, stakeholders and other technical experts	• Panel of appointed individuals (agency scientists, academics, data subject matter experts, stakeholders)	• Panel of appointed individuals (agency scientists, academics, data subject matter experts, stakeholders)
Scope of Data	• Review and provide recommendations on **specific data topics** as defined in the Terms of Reference • Discussion of other data topics not specifically identified is limited	• Review and provide recommendations on the use of **new** data streams or data analysis approaches data as defined in the Terms of Reference • Only **select data** sets up for discussion and consideration	• Review and provide recommendations on all available fishery data, monitoring programs, and life history information • **All data** sets up for discussion and consideration
Documentation	• Working paper may be produced to document the group's discussions	• Panel report produced	• Panel report produced
Component Duration	• Series of webinars • Shortest timeframe	• Series of webinars • Medium timeframe	• One week workshop • Longest timeframe
Platform	• Webinars	• Webinars	• In person or webinar
Cooridnating Body	• SEDAR • All meetings organized by SEDAR are open to the public	• SEDAR • All meetings organized by SEDAR are open to the public	• SEDAR • All meetings organized by SEDAR are open to the public

Last updated 5/29/2026

PAGE 2

Assessment Components

Details	Topical Working Group	Agency Led Internal Assesment Stage	Assessment Webinars
Cooperator Technical Body Check In	✓	✓	✓
Participants	• Small working group comprised of assessment team, SSC members, other technical experts	• Lead assessment agency	• Panel of appointed individuals (agency scientists, academics, other technical experts)
Scope of Modeling	• Review and provide recommendations on **specific modeling approaches** as defined in the Terms of Reference • Discussion of other modeling topics not specifically identified is limited	• Develop assessment **without structured input** from an assessment panel	• Review and provide recommendations on assessment models, model configuration and uncertainty evaluation • **All modeling** topics are up for discussion and consideration
Documentation	• Working paper may be produced to document the group's discussions	• Assessment report produced	• Assessment report produced
Component Duration	• Series of webinars • Shortest timeframe	• No structured meetings • Medium timeframe	• 6–8 month series of webinars • Longest timeframe
Platform	• Webinars	• N/A	• Webinars
Coordinating Body	• SEDAR • All meetings organized by SEDAR are open to the public	• Lead Assessment Agency • No publicly noticed meetings	• SEDAR • All meetings organized by SEDAR are open to the public

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Review Components

Details	Desk Review	Hybrid Desk Review	Review Workshop
Participants	• Individual reviewers appointed by Center for Independent Experts (CIE)	• Individual reviewers appointed by Center for Independent Experts (CIE)	• Panel of cooperator appointed individuals (SSC or technical experts) in addition to reviewers appointed by Center for Independent Experts (CIE)
Scope of Review	• CIE reviewers evaluate if the data, methods and results are scientifically sound and if decision makers are provided adequate advice that reflects assessment uncertainties	• CIE reviewers evaluate if the data, methods and results are scientifically sound and if decision makers are provided adequate advice that reflects assessment uncertainties • Opportunity for reviewers to ask assessment team questions before reviewing assessment	• Panel evaluates if the data, methods and results are scientifically sound and if decision makers are provided adequate advice that reflects assessment uncertainties • Opportunity for the review panel to engage with assessment team and request additional information
Documentation	• Independent CIE reviewer reports produced	• Independent CIE reviewer reports produced	• Panel summary report and independent CIE reviewer reports • If needed, assessment team produces assessment report addendum
Component Duration	• Shortest timeframe	• One webinar between reviewers and assessment team • Medium timeframe	• One week workshop • Longest timeframe
Platform	• N/A	• Webinar	• In person
Coordinating Body	• No publicly noticed meetings	• SEDAR • All meetings organized by SEDAR are open to the public	• SEDAR • All meetings organized by SEDAR are open to the public

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