



Social Science Planning Team

REPORT
Sept 21, 2020
Online public meeting

Members present:

Courtney Carothers (University of AK- Fairbanks)	Steve Kasperski, Chair (AFSC)
Sam Cunningham (NPFMC)	Sarah Marrinan, Coordinator (NPFMC)
Mike Downs (SSC; Wislow Research)	Scott Miller (NMFS-AKRO)
Jim Fall (ADF&G)	Matt Reimer (SSC; University of CA- Davis)
Mike Fey (AKFIN)	Marysia Szymkowiak, (AFSC)
Kate Haapala (NPFMC)	

Members absent:

Seth Macinko (University of RI)

Additional presenters:

Katie Latanich, (Katie Latanich Consulting)

1. Administrative

The North Pacific Fishery Management Council (Council's) Social Science Planning Team (SSPT) convened virtually on September 21, 2020 to discuss next steps for changes to the North Pacific's Economic Data Reporting (EDR) Programs. Meeting agenda, PowerPoints, reference documents/ links and a recording are included on the electronic agenda: <https://meetings.npfmc.org/Meeting/Details/1663>. The meeting began with technical set up and overview of the meeting application.

2. Introduction, review of objectives, and timeline

Steve Kasperski introduced the objectives of the SSPT meeting including 1) discuss EDR workshop and report, and 2) plan the next round of EDR Workshops to get whatever feedback necessary for SSPT to make recommendations on EDR revisions. He described the agenda structured around these two tasks. Based on the two outstanding Council motions on EDRs, Steve explained the SSPT's role here as helping the Council develop a range of alternatives for a future analysis. **The SSPT noted that the Council's past motions,¹ gave them direction for their work. The motions include alternatives for removing the GOA trawl EDR program, or all EDR programs; however, in identifying a range of alternative changes for the Council to consider, a major challenge for the SSPT will be in considering how to ensure we are getting the best information for the Council process at the least cost and burden to the respondents, if the EDR Programs do continue. Thus, discussion will focus more on potential changes to existing EDRs.** The intention for this meeting is to think about large or small changes to the EDRs, plan for the next round of workshops, what follow-up might we need from stakeholders, and how should we organize that follow-up.

¹ Council motion, April 2019: <https://meetings.npfmc.org/CommentReview/DownloadFile?p=695c22f1-5139-4ea6-a7c4-7c92b5428cd2.pdf&fileName=D5%20MOTION.pdf>

Council motion, Feb 2020: <https://meetings.npfmc.org/CommentReview/DownloadFile?p=1d14dd02-387e-4d61-9ff5-9e6071686ce2.pdf&fileName=C4%20MOTION.pdf>

Sarah Marrinan presented the expected timeline for the SSPT's role in EDR revisions.² The August workshop was intended to gather information from stakeholders about their experiences with EDRs. The September SSPT meeting built on that effort and identified topics for in-depth stakeholder discussions as well as a general approach to conceptualizing changes to the EDRs. Next, there will be a series of focused stakeholder meetings to provide feedback on specific issues. This series of meetings may flow into November, given the Council's long October meeting that is coming up. In November, the SSPT will reconvene to discuss the outcomes of the stakeholder meetings and next steps on articulating recommendations to the Council regarding EDR changes. Sarah noted the need to coordinate with industry about this proposed timeline and noted that SSPT members are encouraged to participate in as many meetings as possible but are not expected to be able to make all the meetings. The final report is tentatively scheduled for the Council's February meeting, as which point the Council would receive meeting reports and context from each stage of discussion in addition to the SSPT's range of recommended alternatives.

3. EDR stakeholder workshop report and response

Katie Latanich presented a report from the first EDR stakeholder workshop, covering the workshop agenda and objectives, virtual engagement strategies, and the themes of discussion that emerged. The workshop objectives were 1) to discuss the Council's existing EDR programs, including their objectives, the use of EDR information to support decision-making, and the relationship between the data elements collected, economic performance metrics, and the management questions they can inform and 2) generate ideas for improving the usability, efficiency, and consistency of existing EDR programs while minimizing their cost and burden to industry and the government.

Katie highlighted some of the engagement tools used to connect with the 60+ participants and elicit input from stakeholders. Stakeholders were asked four questions in the short-answer format, all geared towards the second meeting objective of thinking about the usability, efficiency, and consistency of existing EDR programs while minimizing their cost and burden. Katie provided the SSPT with a brief summary of stakeholder responses to these questions which are summarized in the workshop meeting report.³ She felt the meeting was successful in getting broad participation and frame of reference.

One SSPT member asked Katie and workshop facilitators if they felt there were certain types of information solicited in the meeting that did not lend itself to easy discussion in this virtual format and how engagement could be improved in the future. They responded that certainly some types of discussion may be improved in person; however, that is not an option right now. This format is particularly useful for big picture discussion and for reaching a wide array of stakeholders as there is lower cost and commitment in a two-hour virtual meeting compared to a day or two in person workshop. However, larger groups can make it more intimidating to participate and the choice to incorporate all EDRs into the discussion inherently broadens the scope. Thus, we heard many of the overarching concerns we have heard in the past without allowing for much opportunity to hone in on the more specific context of those concerns. These drawbacks relate to both the virtual nature of the meeting, as well as other decisions we made (e.g. incorporating discussion of all EDRs); however the meeting facilitators intended for this meeting to be a first step of stakeholder engagement, highlighting broad concerns and questions that were consistent across EDRs. The facilitators are optimistic that follow-up meetings, with smaller groups of EDR-specific stakeholders, could provide the back-and-forth communication that would be helpful for more focused, nuanced context.

² Note that some of these expected dates have changed since discussed at the SSPT. Please check <https://www.npfmc.org/edr/> for updated information.

³ <https://www.npfmc.org/wp-content/PDFdocuments/meetings/EDRwebinar9.14.20.pdf>

One SSPT member pointed out that while stakeholders provided their feedback the on cost and burden of EDRs, based on the way the questions were asked, there was no way to gauge their views on the relative importance of the issues highlighted. Gathering this input from stakeholders could be informative for the SSPT, helping members to understand the degree to which aspect of the data collections contribute to the costs and burdens of EDRs, rather than for example, the whole universe of cost and burden. This could be included in follow-up discussions with stakeholders.

The SSPT discussed takeaways they had from the first stakeholder workshop.

- Some SSPT members highlighted the diversity they heard in what EDR information should be used for. **Many stakeholders felt information that is worth collecting would include data that is directly informative to Council decision-making.** Another stakeholder felt there was value in providing economic trends that are more indirectly used for decision-making but provided context and background on fishery dynamics.
- A few SSPT members picked up on stakeholder frustration in considering EDR utility or future utility, because **it is not clear to them how EDR data was intended to be used.** Some stakeholders expressed concern regarding the questions the current EDR intended to answer and one stakeholder mentioned that in order to understand how we may want to change the EDRs, we need a clear sense of what we want to do with the data. An SSPT member expounded on this idea, stating that the skipper survey in Amend 91 has potential to provide real time information on the prosecution of the fishery, but if we were to change that we would have to have a clear purpose of what we would use those data for. Also, stakeholders highlighted that since these Amend 91 skipper survey EDR questions were developed, much has changed in the fisheries and therefore there is staleness to the relevancy of some information gathered. How we might update these questions to make them relevant is also dependent on what we are intending to use the resulting data for.
- SSPT members also noted divergent perspectives in how much consistency stakeholders felt was appropriate between EDRs; some preferred a more modular approach while other talked about a having a slimmed down, but more consistent set of economic questions.
- There was some discussion about whether the feedback provided from stakeholders was categorized into “issue 1” and “issue 2” level changes (meaning minor changes versus more holistic changes, respectively based on previous Council motions). Potential changes were not explicitly presented to stakeholders in these categories, nor was information sorted this way in the meeting summary. Most of the discussion and responses from stakeholders indicate a level of interest in larger changes; however, some highlighted more fine-scale changes.

4. The role and type of economic information useful for the Council process

In light of the Council’s April 2019 motion requesting the SSPT make recommendations on revisions to the current EDR requirements, including improving the utility of data for analysis of impacts of Council actions, the SSPT engaged a high-level dialogue about how members thought economic data should be used to support the Council’s process, and what members thought would be the most compelling economic data for decision-making. This conversation was intentionally structured to include topics or potential datapoints broader than the current EDR structure to fully capture the possible realm of useful data, understanding practical constraints and reporting burden may limit what is ultimately recommended. To suggest revisions, the SSPT first needs to describe the data’s intended use (and ensure this match with the Council’s expectations for use). Answers to these questions could also provide insight into whether the priority information is currently available through the current EDR or other data collections and help the SSPT explain why they may recommend the collection of certain information.

In terms of *how* to use the data, one SSPT member said that if there is a demand for data collected to be used regularly in Council decision-making, then at a bare minimum the role for economic information

should be monitoring and explaining/ evaluating impacts of past Council action to help inform future actions. Predicting in a more formal sense – in terms of modeling etc., is probably a lesser goal of economic information in the Council process. However, another SSPT member mentioned that economic information for predicting in a more informal sense, i.e. of providing a forward-looking analysis, can also be important for the Council process as well by projecting potential economic impacts across alternatives under consideration. However, the detailed data required to make informed predictions will necessarily be more burdensome than a simpler data collection aimed at monitoring trends in economic performance.

With regards to the *type* of social and economic data that is compelling for the Council process, the group discussed how this can vary depending on the specific proposed action. An effective data collection is a long-term undertaking, and many questions are difficult to anticipate. However, **to inform Council decisions, the SSPT could identify a core set of questions that are often present regardless of the specific Council decision or fishery under consideration.** By identifying these persistent questions, performance metrics could be developed, which would inform data collection needs.

- Several members spoke to the significance of cost data, both for contextual information and for informing specific Council decision-points. Data sources outside of EDRs provide broad-based information on revenues but currently we are limited in our ability to demonstrate the impacts of policy decisions on industry costs. Council decisions often more directly affect fleets on the cost side as opposed to gross revenues. Another SSPT member highlighted the role of cost data in the mandate to consider net benefits to the Nation. An AFSC economist noted that some cost variables are useful for their own intrinsic value (e.g. people have been interested in tracking crew wages) but the value of others is in its ability to inform an aggregated cost metric (or quasi-rents or gross operating profit).
- However, it was noted that cost data is not often incorporated into current Council analyses, despite being available in some of the EDRs (Amend 80 and to some extent, crab EDR). The impact of Council decisions on fleet costs are often addressed qualitatively on a relative scale rather than with specific magnitudes. A few SSPT members spoke to the challenges with using current cost information from the EDRs. For instance, there are always external factors that influence cost variables for a business, isolating the specific impact of a Council decision on costs would require a more sophisticated model than are currently regularly developed for analyses.
- There was also some discussion about the burden of gathering cost data in a disaggregated form. Many of the cost variables currently requested in the Amendment 80 EDR are nuanced and not intrinsically usefully on their own. However, they may be aggregated to provide the calculation of net operating revenues in a way that is calculated and understood consistently across respondents. If net operating revenue continue to be a part of an economic data collection, SSPT members wondered whether it would be easier for respondents to report a single number, compared to disaggregated costs. Or perhaps there are some costs that are typically bundled together that create additional burden to separate. These questions could be informed by additional follow-up with stakeholders.
- Some SSPT members highlighted the value of regional expenditure data for informing Council decisions. Adding location to expenditure data could help demonstrate how money moves through communities, the community economic impacts and employment opportunities resulting from harvesters and processors operations. This could help analysts better predict positive or negative distributional impacts from a future Council decision (and possibly even that magnitude of that impact) or provide a more accurate retrospective assessment of economic impacts during program reviews. Despite its significance, it was noted these would be very difficult data to collect in an annual EDR-type form. An AFSC economist stated this was attempted before and completely overwhelmed respondents. However, AFSC and NMFS Regional Office economists have been working on an economic impact model (Multi-Regional Social Accounting Matrix) which included a voluntary supplemental survey to get regional expenditures shares across

several non-EDR fisheries sectors. Rather than through EDRs, regional expenditure may be a better candidate for a voluntary periodic data collection that would supplement with annual data that vary more from year to year based on fishing, ecological, and economic conditions.

- A member mentioned that one reoccurring theme is in attempting to explain expected distributional impacts of an action, when some stakeholders/ processors/ communities benefit and others do not. For example, there has been challenges with analyzing potential crew impacts, number of crew affected by action, and community associations in many actions. While we have this information for some EDR fisheries, this tends to be a reoccurring information deficit that makes it difficult to predict crew and community impacts from a Council action.
- A few SSPT members highlighted additional distributional and equity concerns that can be compelling for policy as well. EDRs are business surveys, but outside of just the fleets, policy decisions can have economic ramifications for communities, tribes, crew, and small-scale participants. For instance, in thinking about the economic aspect of crew employment and how they might be influenced by Council decisions, in addition to wages, other relevant economic information can include duration of employment, stability of employment, scope or changes in employment options, wages and job satisfaction. These topics may not be the right fit for EDRs – which have traditionally been business surveys (versus, for example, a crew survey), but the importance of EDR data doing “double duty” providing information both on economic performance and distributional equity is worth noting as we are thinking broadly about the type of economic information that can be compelling for the Council process. Moreover, if we only include rigorous economic information at the business level, this demonstrates an information gap that can lead to equity concerns of representation.
- An SSPT member mentioned that many of these reoccurring areas of limited information have already been identified by the SSPT in the Data Gap Analysis. Depending on the types of changes the Council considers for EDR programs, some of those gaps could be addressed through a revised EDR.
- There was some discussion about the appropriate scope of SSPT discussion regarding potential larger changes to EDRs.
 - One member of the public voiced their concerns that the SSPT’s conversation was going beyond the scope of action requested by the Council. They felt the SSPT should be focusing on addressing the issues with the data currently being collected (its current use and challenges with utility) rather than additional needs for data collection.
 - Several SSPT responded to this comment, indicating they felt this broader scope was essential to effectively respond to the Council’s requests. One member noted that the workshop identified issues with the current EDRs, including its limited use in Council decision making documents. If current EDRs are not demonstrating their utility in analyses – this begs the questions why? And what is the type of information that *would* inform Council decision making documents? Another SSPT member concurred stating that this discussion has tracked the four components listed in the Council’s “issue 2” motion: a) the need for economic information and the utility of it b) looking at duplicative information c) looking at alternatives for more consistency across EDRs so there is more utility and d) the tradeoff of elements in aggregations.
 - Another member of the public felt that we should entrust our scientists to do the best job possible. They stated that they appreciated the conversation of what is currently missing from collection, what is/is not being used, and how to do better.

Reflecting on some of the stakeholder feedback from the first EDR workshop that any economic information collected be used to directly inform Council decisions, SSPT members noted the fragmented nature of the four current EDR programs limits that possibility (i.e. economic data reporting is only requested of particular sets of processors and fleets, and the data are collected somewhat inconsistently

across EDRs). One of the primary reasons the EDR data is not used more in the Council process is that there is no broad-based and comprehensive data collection across fisheries. The data generally tends not to be used when the action expands across a fishery that has an EDR and a fishery that does not. There are some exceptions, for instance, EDR data has been used more recently in the halibut Abundance Based Management EIS and BSAI Pacific cod LAPP analysis under development. However, descriptions of crew impacts could be more complete with more broad-based EDR.

To make EDR data more applicable for Council decision-making, the SSPT discussed the concept of implementing a slimmed-down, broad-based data collection mechanism, voluntary or otherwise, that spanned more fisheries than under the current the EDRs. This concept was also mentioned by some stakeholders in the workshop. This could be done on a fishery basis or a topic basis (e.g. voluntary crew survey). There would be practical challenges and questions of burden to consider, as well as the need to be intentional about engaging these other stakeholders into the process. For instance, given the more widespread burden an action like this would create, the SSPT would need to consider trade-offs related to this burden (e.g. fewer, simpler questions, consideration of frequency, voluntary, etc.) prior to developing this recommendation. The Council's motions focus on "current EDRs" so it is not clear whether this is something it is interested in considering and at this stage, and it may be premature to engage non-EDR fishery stakeholders. However, as the Council requested SSPT assistance with improving the utility of the current EDRs, members felt it relevant and important to reemphasize that the compartmentalized nature of the current EDRs are one of the principle limitations in its usefulness in Council analyses, which tend to span multiple fisheries.

5. Next round of EDR discussions

The SSPT supports using an organized framework to describe the range of EDR changes to recommend to the Council in terms of 1) no change, 2) small changes, 3) large changes, and 4) eliminate programs.

framework also lends itself to the items the Council currently has in its motions. For example, smaller changes (e.g. removing third party audit requirements, as included in the Council's "issue 1" motion), broad-scale changes (e.g. implementing more standardized EDRs with appropriate variations to address different operation and gear types- as included in "issue 2") and considerations for removing the GOA trawl EDR Program or all EDR Programs (as included in "issue 1"). Some of these changes may be mutually exclusive and some could potentially be adopted in tandem.

There was additional discussion about whether the SSPT should focus their efforts on informing just larger more holistic changes or both types of changes. One SSPT member voiced their perception that large changes to the programs were necessary. This member highlighted crew data and lease information as particularly valuable relative to other information collected. Another member stated that the discussion of large changes was more aligned with the SSPT's expertise whereas smaller changes might be better assigned to specific NMFS/ Council/ AFSC staff with EDR expertise. This member also indicated their perception that we should be seeking to create a well-functioning, coordinated data collection among fisheries. These members questioned whether it was worth the time and attention to focus on specific variables, when these small changes may be mutually exclusive from a broad-based EDR change. However, some members were concerned that if all that was prepared for the Council were options for larger changes, they might not have an opportunity to weigh in on smaller changes. It is not clear at this point if the Council had more interest in smaller variable-specific changes, versus changes that reconsider the purpose and needs and create consistency among the economic data collections. Thus, a focus solely on large-scale changes to EDRs could ultimately make the SSPT's work on this irrelevant if the Council chose to only make small changes to existent EDRs.

It was noted that SSPT members would need to consider if recommended changes align with the current purpose and need statements for these EDRs. For example, the current EDRs are very different from each other because they were developed in different ways for different purposes. If it is the Council's intent to generate more consistency the economic information collected for the purpose of making them more generally applicable to Council analyses (as suggested by the Council's April 2019 motion), these purpose and need statements will likely need to change. The SSPT could also highlight where large/ small changes could end up being mutually exclusive (e.g. if the Council wishes to develop a slimmed down EDR and eliminate certain questions) or places where larger and smaller changes could end up being considered in tandem.

The SSPT discussed the best way to follow-up with stakeholders: by EDR fishery, by respondent type (processors, harvesters, CPs) or by data elements (crew data, capital investments, etc.). **Members agreed to follow up with four meetings – one for each EDR fishery.** At this point the EDRs are so different, this structure seems to make the most sense, particularly for questions relating to smaller variable-specific changes. There was some concern and acknowledgement that having four different conversations would create four different expectations with regards to potential large-scale changes. Nevertheless, some SSPT members felt that EDR-specific meetings provide an opportunity to delineate lessons learned that can ultimately be applied in formulating suggestions for both small scale and large scale changes.

It was acknowledged these additional meetings are asking a lot of the public and of SSPT members. There are already many NPFMC meetings scheduled for October and there will be a need to coordinate with stakeholders to identify the best time for meetings. This is more of a time commitment than was originally requested of SSPT members and it is not expected that every member would be attend each meeting. A self-selected sub-group of SSPT members will help to host these meetings based on availability.

It will be necessary to identify objectives and questions for stakeholders to plan the next step. One SSPT member mentioned that that should include discussion points at the data point level (labor data, expenditure data, etc.). If we do not come to the meeting prepared in that way, it may be difficult to make progress. One SSPT member hoped for time to consider information gaps in recent Council analyses and whether that could be informed by a revised EDR. **The group agreed to follow up with a Google Document to identify these parameterized questions on potential small and large changes as well as meeting objectives to accompany meeting materials.**